User's/Administrator’s Companion Guide: Standard Edition

SAMS I&R

1.10.x

SAMS 1.10.x

Synergy - Now Harmony Information Systems, Inc.
25 New England Drive
Essex Junction, VT 05452

(802) 878-8514
Internet E-Mail: info@synergysw.com
Website: http://www.synergysw.com

Contents

Introduction

The Synergy Aging Suite by Harmony is pleased to offer SAMS I&R™, which integrates the powerful information and referral features of BeaconIR™ with SAMS®, the leading consumer management software solution.

The integration of Beacon's I&R functionality directly within SAMS addresses the wishes of Beacon users nationwide, and specifically results from the Beacon Summit Meeting in Chicago in late 2006.

Beacon and SAMS now share the same consumer and provider databases. The call interface has been re-designed to enhance ease of use and to improve searching capabilities. You can easily merge SAMS Consumers and I&R Consumers, or enroll I&R Consumers for SAMS services. Basically, you get the best of both SAMS and Beacon in one program!

This model is ideal for the 'No Wrong Door'/'Point of Entry'/'Resource Center' models, since I&R is built into the larger case management system and the new features include the ability to electronically refer consumers to other organizations through SAMS.

I&R Features

SAMS includes these popular I&R features:

- **Call Timing and Tracking -** Track start and end times of incoming and outgoing phone calls automatically. You can also pause calls - SAMS I&R keeps a running timer of how long a call has been paused.
- **Assessments -** search for and create assessments from within a call, or in a consumer record. You can also create assessments for anonymous consumers.
- **Advanced Search and Referral -** new real-time search functionality automatically searches on locations, services, and program characteristics, returning results as you type. Program referrals are recorded in the call record.
- **Topic Tracking and Journaling -** track topics discussed and enter notes about each call.
- **Activities -** Make referrals to other SAMS Agencies and Providers and easily schedule call backs, informational e-mails, and mailings during a call.
- **Call Log Management -** manage call records after completed calls. Search for call records based on different criteria in the call log.

- **Service Delivery** - service delivery templates allow you to automatically create various types of service deliveries in a call record, as well as auto-enroll consumers for services.
- **Reports** - choose from several highly customizable I&R reports to help you make the most of your organization's call information.

Using this Guide

This companion guide is meant to supplement the SAMS User's Guide and SAMS Administrator's User's Guide. It provides only an overview of the I&R features within SAMS. It is divided up into the following sections:

- *Customizing SAMS I&R* - looks at setting up *I&R Settings* in the **Options** menu.
- *Managing I&R Consumers* - discusses the *I&R Consumer* list.
- *Call - Summary Screen* - outlines the parts of *Call - Summary* screen and the procedures used for entering call information.
- *Using the Call Log* - an overview of *Call Log* features.
- *Call Navigation Pane* - outlines the procedures used for entering call information using the *Call - Summary* screen's call navigation pane.
- *Reports* - looks at the I&R reports available to you.
- *I&R Administration* - a table for SAMS Administrators that outlines I&R setup within SAMS Administrator.

Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➢)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

Customizing SAMS I&R

Customizing SAMS I&R describes the ways you can customize SAMS I&R defaults to improve your work flow using **Options** in the **Tools** menu.

For more information about the other settings in **Options**, use the SAMS **Help** files. To access the **Help** files, select **Search** from the **Help** menu and enter the appropriate term.

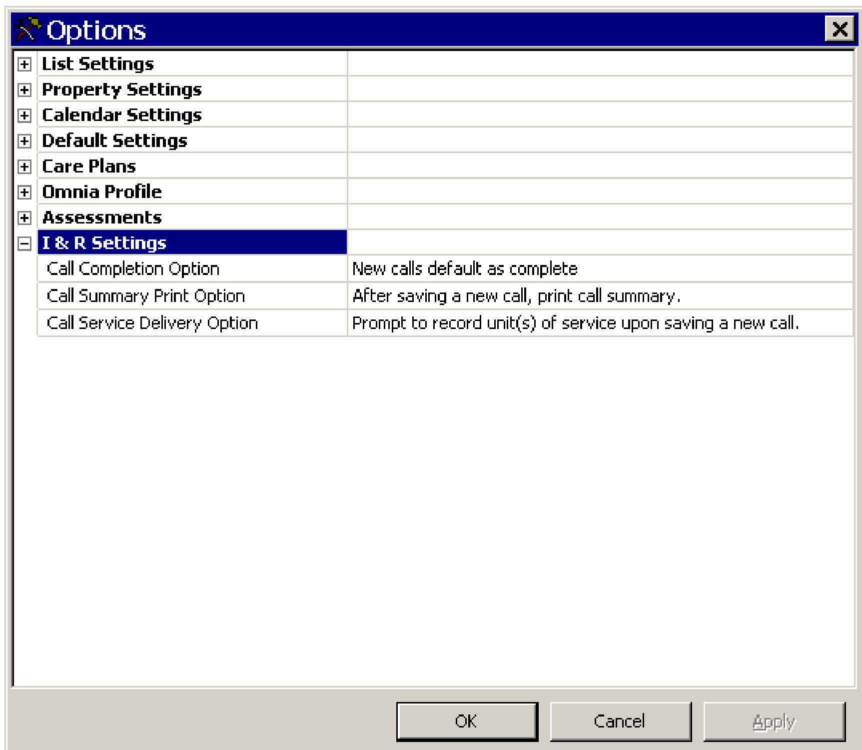
Configuring I&R Settings

I&R Settings offers default call options to help you better manage calls. Your user role must have permission to modify the settings.

➢ *To change I&R settings*

1 From the **Tools** menu, select **Options...**.

2 If not already displayed, click the plus sign ⊞ to expand the *I&R Settings* heading.



3 Under *Calls Completion Option*, select a default for completed calls. If you select **New calls default as complete**, a check automatically appears in the *Complete?* column of the *Call Log* screen. If you select **New calls default as incomplete**, no check appears. **Prompt to complete new calls on save** forces users to select **Complete** or **Incomplete** at the end of each call.

4 Under *Call Summary Print Option*, select whether you want to have SAMS automatically print a call summary, an anonymous call summary, a custom call summary, or no call summary after saving a new call. *Anonymous Call Summaries* do not include any personal consumer data. *Custom Call Summaries* print only the Call Sections you select in the *Print Call* screen.

5 Under *Call Service Delivery Option*, decide how (or if) you want service deliveries to be recorded when saving a call. Choose to have SAMS automatically record units of service against a consumer (or a consumer group if the caller is anonymous), to prompt users to record units of service when saving a call, to have SAMS automatically record units of service against the call's consumer, or to not record units of service at all upon saving a new call.

Managing I&R Consumers

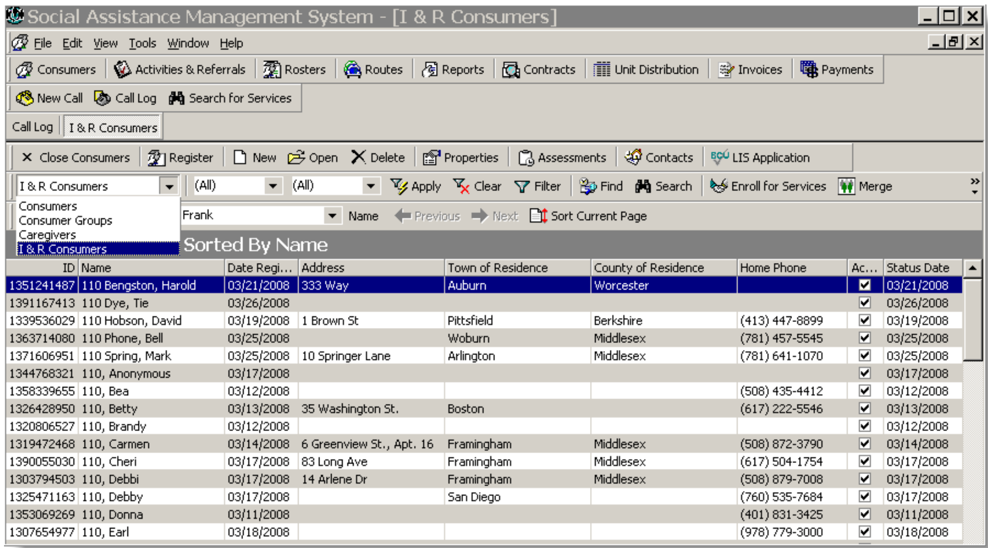
An *I&R Consumer* is any consumer that has never been enrolled for services. Typically, these are your Callers. You can use the *I&R Consumers* list to manage I&R Consumers just as you use the *Consumers* list to manage regular SAMS consumers. The *I&R Consumers* list features are nearly identical to the Consumers list.

You'll notice that a new I&R Consumer type has been added to the *Type* filter in the *Consumers* list. Selecting I&R Consumers from the *Type* filter limits the *Consumers* list view to only I&R consumers. When you access the *I&R Consumers* list, an Enroll for Services button appears on the toolbar. See ***Enrolling an I&R Consumer for Services*** (on page 17) for more information.

You can use the *I&R Consumers* list to access, delete, or deactivate an I&R Consumer, to register an I&R Consumer, to view the properties of an I&R Consumer, or to do anything else that you would normally do from the *Consumers* list. You can also access the ***I&R Consumer Summary Screen*** (on page 9) from the *I&R Consumers* list.

For more information on using the *I&R Consumers* list features, see the SAMS User's Guide or **Help** files. To access the **Help** files, select **Search** from the **Help** menu and enter the appropriate search terms - e.g. 'viewing consumer properties' or 'deactivating a consumer.'

Note that you can merge an I&R consumer and a regular SAMS consumer. However, you can only merge an I&R Consumer into a SAMS Consumer. You cannot merge a SAMS Consumer into an I&R Consumer.



I&R Consumer Summary Screen

The *I&R Consumer Summary* screen is a pared down version of the regular *Consumer Summary* screen. The consumer summary navigation pane contains only 5 sections: Summary, Details, Assessments, Consumer Journal, and Call History. The Details section has also been streamlined for I&R consumers. It contains only *General*, *Contacts*, *Locations*, *Phones*, *User Fields*, and *Ethnic Races* areas.

You can enroll an I&R consumer for services from this screen, as well. See ***Enrolling an I&R Consumer for Services*** (on page 17) for more information.

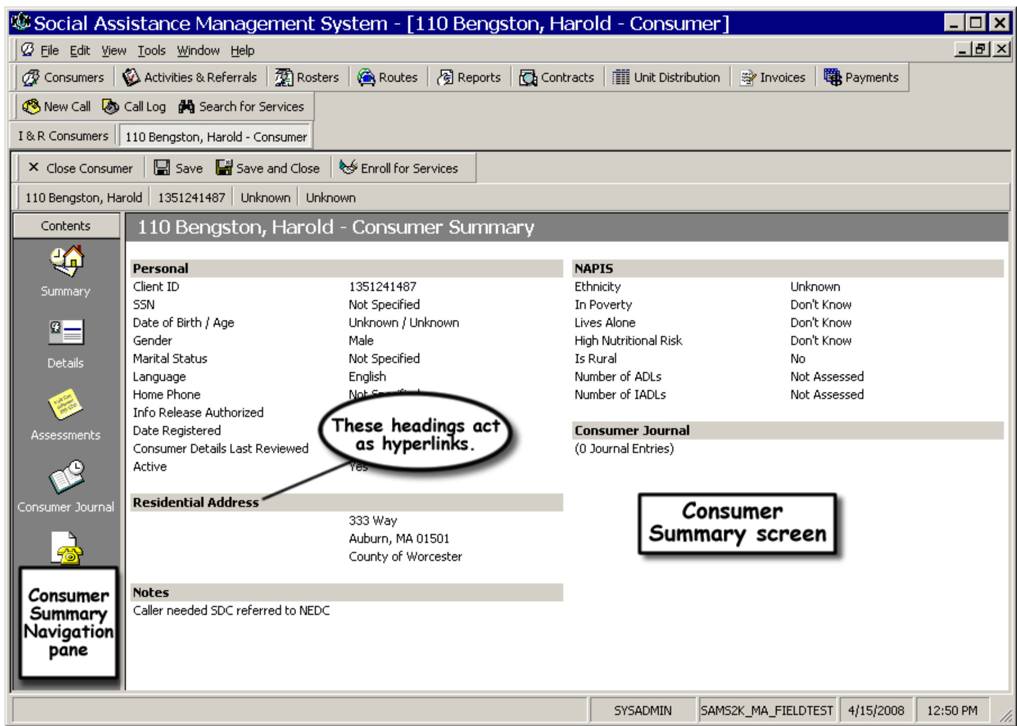
Since the SAMS User's Guide and Help files cover the *Consumer Summary* screen in great detail, this section provides only an overview of these areas.

Use Filter, Find, or Search if necessary to locate a record. See the SAMS User's Guide or Help files to learn more about these features.

➢ *To access the I&R consumer summary screen*

1. Click **Consumers** on the toolbar.
2. From the *Type* filter, select **I&R Consumers**.
3. In the *I&R Consumers* list, find the appropriate record.
4. Double-click the record to open it.

-OR- Highlight the record and click **Open** on the toolbar. -OR- Right-click and select **Open I&R Consumer**. -OR- CTRL+O.



5. View or modify ***Details*** (see "Consumer Details" on page 11), ***Assessments*** (see "Consumer Assessments" on page 12), ***Consumer Journal*** (on page 13), and/or ***Call History*** (see "Consumer Call History" on page 14) as needed. The headings in the *Consumer Summary* screen act as hyperlinks. Click a heading to go that area of the consumer record.
6. When you are ready, click **Save** or **Save and Close**.

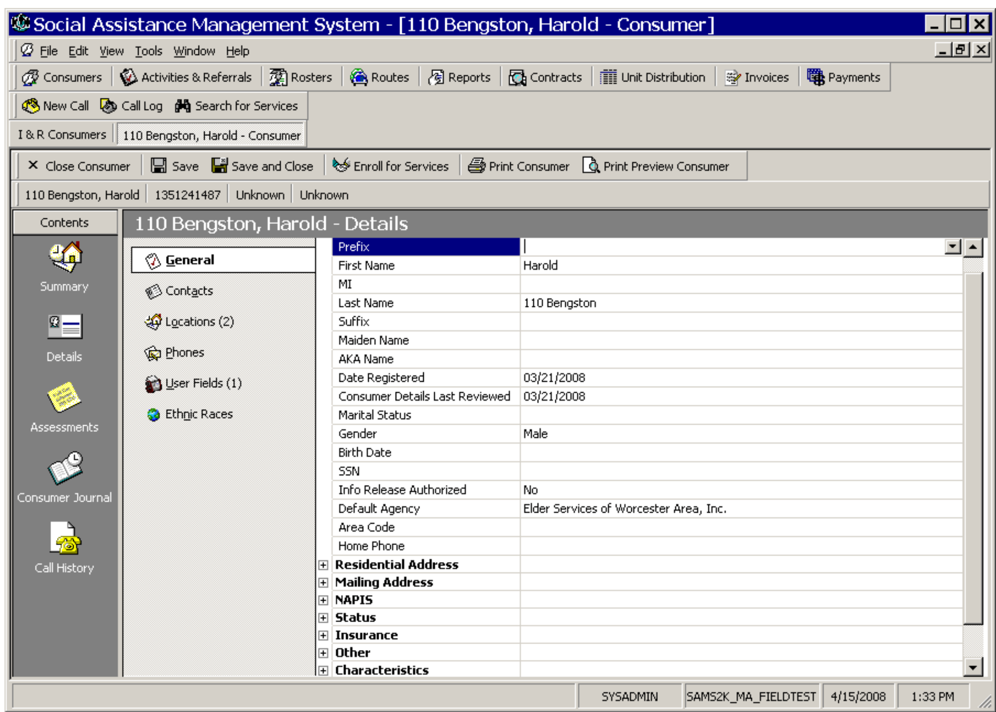
Consumer Details

For more detailed information on the Consumer Record or Details, see the SAMS User's Guide or the SAMS **Help** files.

> Your user role must have permission to view, create, update, or delete a call details.

➢ *To view, add, modify, or delete details*

1. Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
2. Click **Details** in the consumer summary navigation pane.
3. View, add, modify, or delete information in the *General*, *Contacts*, *Locations*, *Phones*, *User Fields*, and/or *Ethnic Races* areas as necessary.
4. Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

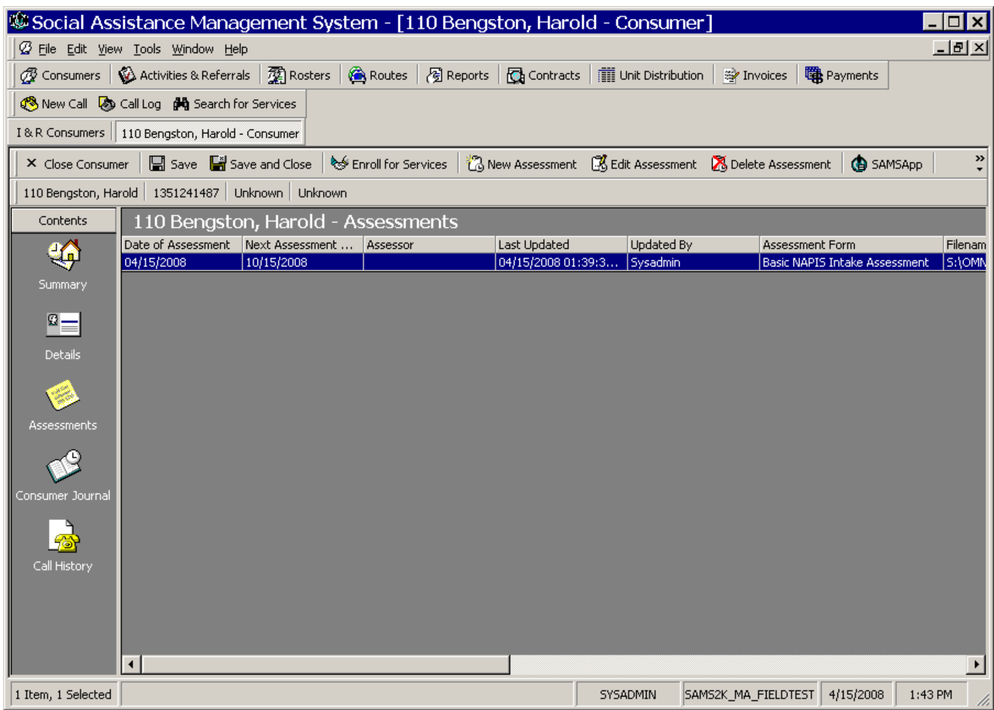


Consumer Assessments

> Your user role must have permission to view, create, update, or delete assessments.

➢ *To view, add, modify, or delete assessments*

1. Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
2. Click **Assessments** in the consumer summary navigation pane.
3. View, add, modify, or delete assessments as outlined in the SAMS User's Guide or the SAMS Help files.
4. Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.

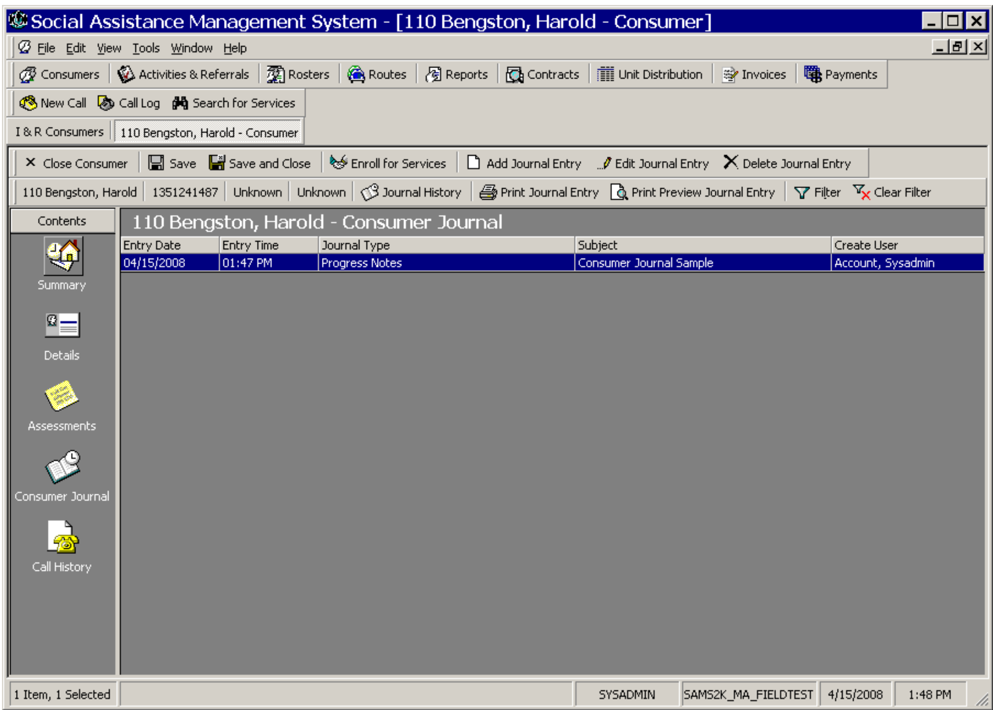


Consumer Journal

> Your user role must have permission to view, create, update, or delete a consumer journal. Additionally, journals are subject to organizational security - meaning that access may be limited by organization.

➢ *To view, add, modify, or delete consumer journal entries*

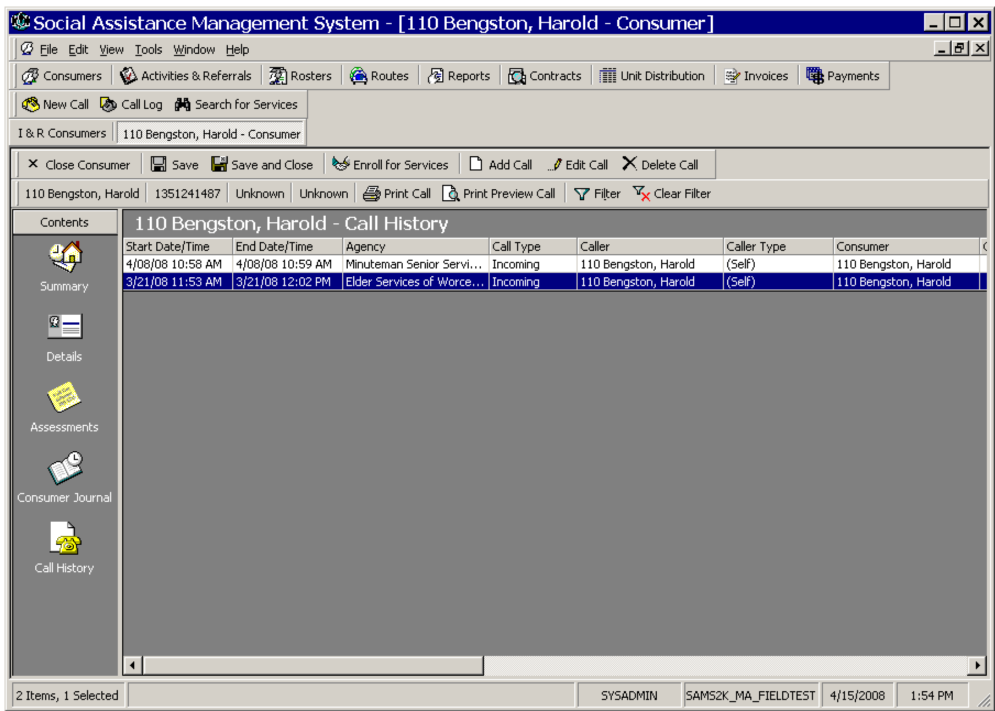
1. Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
2. Click **Consumer Journal** in the consumer summary navigation pane.
3. View, add, modify, or delete journal entries as outlined in the SAMS User's Guide or the SAMS Help files. Note that if your user role does not have permission to modify date and time fields, you will not be able to do that here.
4. Click **Save** to save your changes and move to a different area of the record, or click **Save and Close** to close the record and return to the *I&R Consumer* list.



Consumer Call History

You can add, view, modify, delete, and print calls from this *Call History* screen. The *Call History* screen displays calls similarly to the Call Log, however the *Call History* screen is consumer-specific.

Your user role must have permission to view, create, update, or delete a call history. Additionally, call history is subject to organizational security - meaning that access may be limited by organization.



➢ *To add calls*

1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.

2 Click Call History in the consumer summary navigation pane.

3 Click Add Call on the toolbar.

-OR- Right-click in the *Call History* list and select Add Call. -OR- CTRL+N.

4 Add information as outlined in the ***Call - Summary Screen*** (on page 20) section.

5 Click Save to save your changes and move to a different area of the record, or click Save and Close to close the record and return to the *I&R Consumer* list.

➢ *To view or modify calls*

1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.

2 Click Call History in the consumer summary navigation pane.

3 Double-click the call record you want to view or modify to open it.

-OR- Right-click a call record and select Edit Call. -OR-CTRL+O. -OR- Highlight the record and click Edit Call on the toolbar.

Create a filter to manage a large number of records. See the SAMS User's Guide or Help files for more information about filters.

4 Edit the call as necessary. The process of editing call information is the same as adding call information. See the appropriate area of the ***Call - Summary Screen*** (on page 20) section for more information.

5 Click Save to save your changes and move to a different area of the record, or click Save and Close to close the record and return to the *I&R Consumer* list.

➢ *To delete calls*

1 Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.

2 Click Call History in the consumer summary navigation pane.

3 Highlight the record you want to delete and click Delete Call on the toolbar.

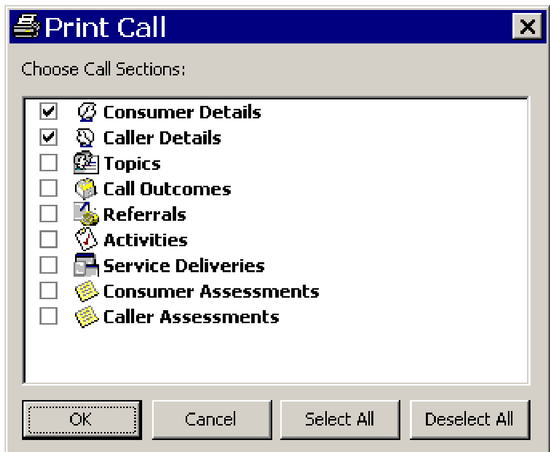
-OR- Right-click and select Delete Call. -OR- CTRL+D.

4 Click Save to save your changes and move to a different area of the record, or click Save and Close to close the record and return to the *I&R Consumer* list.

➢ *To print calls*

1. Access the appropriate consumer record as outlined in *I&R Consumer Summary Screen*.
2. Click Call History in the consumer summary navigation pane.
3. Highlight the record you want to print.
4. Click Print Call  on the toolbar.

-OR- Right-click and select Print Call. -OR- CTRL+P



5. Select the Call Sections you want to print.
6. Click OK.
7. If necessary, select a printer and click Print.
8. Click Save to save your changes and move to a different area of the record, or click Save and Close to close the record and return to the *I&R Consumer* list.

Enrolling an I&R Consumer for Services

If you enroll an I&R Consumer for services, you are essentially converting the consumer from a SAMS I&R Consumer to a regular SAMS Consumer. This means that you can offer them the full range of SAMS services. Services specific to standard SAMS consumers include:

- Care Enrollments
- Co-Pays
- Consumer Care Managers
- Fund Identifiers
- Consumer Providers
- Caregivers and Care Recipients
- Service Suspensions
- Care Plans
- Service Orders

Once you enroll an I&R Consumer for services, they will no longer be visible in the *I&R Consumers* list. Instead, SAMS moves them to the regular *Consumers* list. This means that their security settings also default to the security settings in place at your agency for SAMS consumers.

You can enroll a consumer for services either from the *I&R Consumers* list or from within an *I&R Consumer* record. Both procedures are outlined below.

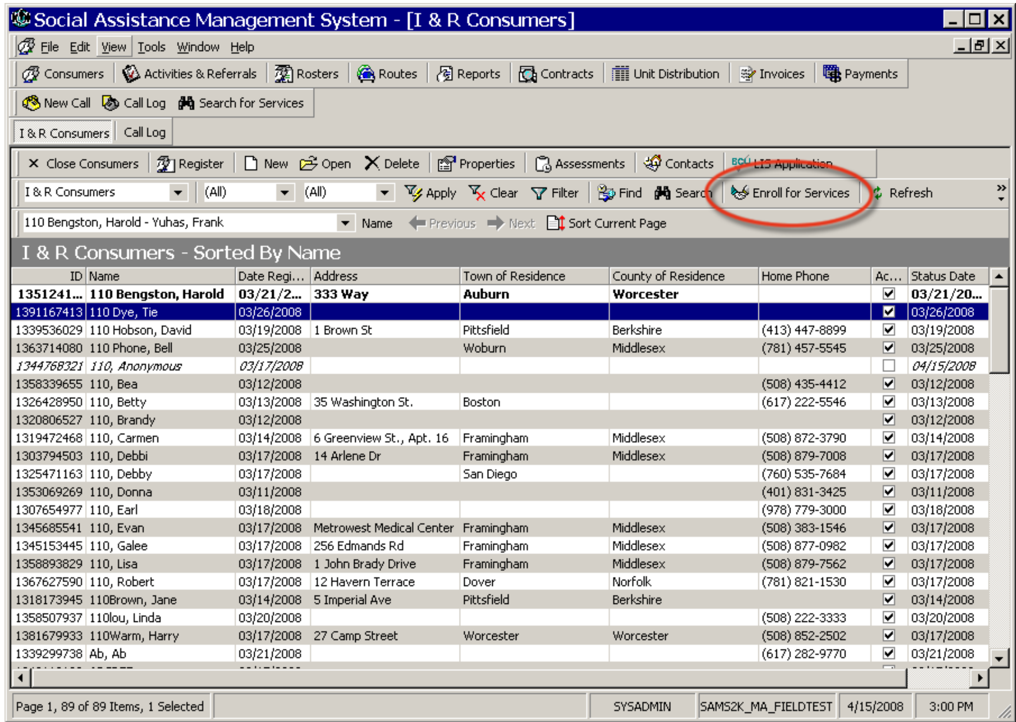
➢ *To enroll a consumer for services from the consumer list*

Use Filter, Find, or Search if necessary to locate a record. See the SAMS User's Guide or Help files to learn more about these features.

1. Click **Consumers** on the toolbar.
2. From the *Type* filter, select **I&R Consumers**.
3. In the *I&R Consumers* list, find the appropriate record.
4. Highlight the record and click **Enroll for Services** on the toolbar.

   -OR- Right-click and select **Enroll for Services**. -OR- Select **Enroll for Services** from the **File** menu.

5 The I&R Consumer record appears in bold print. Click **Refresh** to update SAMS and move the record to the *Consumers* list.



➢ *To enroll a consumer for services from within an I&R consumer record*

1 Click **Consumers** on the toolbar.

2 From the *Type* filter, select **I&R Consumers.**

3 In the *I&R Consumers* list, find the appropriate record.

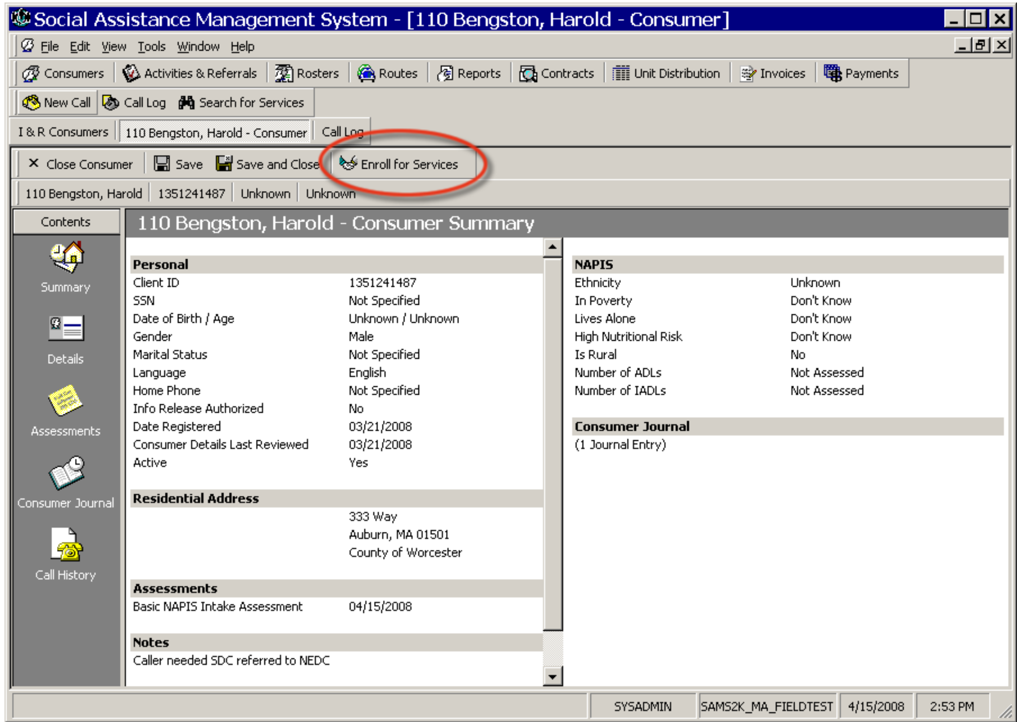
4 Double-click the record to open it.

-OR- Highlight the record and click **Open** on the toolbar. -OR- Right-click and select **Open I&R Consumer**. -OR- CTRL+O.

5 Click **Enroll for Services** on the toolbar.

-OR- Select **Enroll for Services** from the **File** menu.

6 SAMS updates the record. You'll notice that the consumer summary navigation pane now contains all the usual areas of a consumer record - Service Orders, Service Delivery, etc.

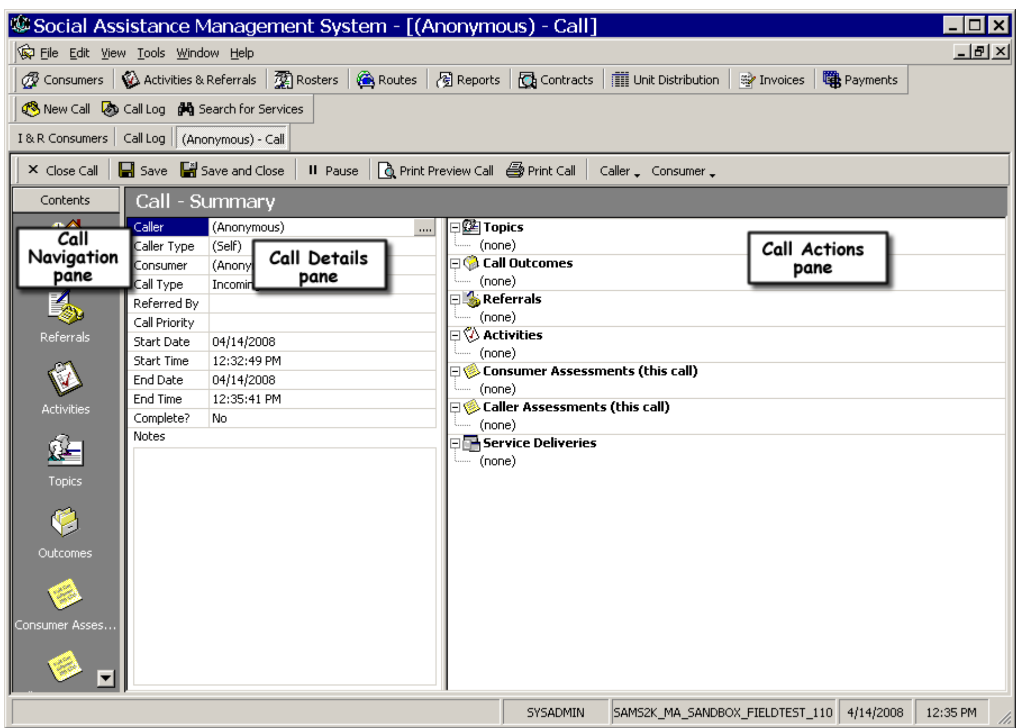


Call - Summary Screen

The *Call - Summary* screen provides you with a quick and easy way to manage a call from one screen. Organized similarly to SAMS' other screens, the menus, toolbars, and taskbar offer access to program data and features. The *Call - Summary* screen is divided into two panes - the call details pane and the call actions pane. The call details pane stores basic call information. The call actions pane contains headings that give you access to specific call areas where you can quickly view, add, and edit call actions.

The call navigation pane to the left of the screen displays the same headings as the call actions pane, with the exception of Service Deliveries. Use the call navigation pane as an alternative way to navigate and access different areas of a call record.

This section outlines how to enter calls using the call actions pane, as well as how to pause the call timer, print a call summary, and print mailing labels. See ***Call Navigation Pane*** (on page 48) for more information. Generally, it's faster to enter information using the call actions pane rather then the call navigation pane.



Call Taking Overview

This section outlines the general procedure for taking calls using SAMS I&R's *Call - Summary* screen. At first glance, this may look quite different than entering a call into the stand-alone version of BeaconIR, but you'll see that it's very similar once you get used to the new look!

From the *Call - Summary* screen, you can navigate to all the areas of a consumer call. Within this screen, you have the option of using either the headings that appear in the call actions pane, or of using the ***call navigation pane*** (on page 48). Generally, it's faster to use the call actions pane since you don't have to navigate away from the main *Call - Summary* screen, but you should use whatever method that feels most comfortable to you - both methods achieve the same results.

About Call Records

SAMS I&R stores a consumer, caller, and consumer/caller relationship with each call record. The *Caller* is the person you are communicating with. The *Consumer* is the person who needs, may, or will receive services. *Caller Type* defines the nature of the caller's relationship to the consumer. Either the consumer or the caller can be anonymous.

Types of Calls

SAMS I&R can record many types of phone calls/communications, including:

- Anonymous Caller about a named Consumer - an unknown caller phoning on behalf of an identified consumer.
- Consumer Call - a consumer phoning to obtain information for him or herself.
- Named Caller about a Named Consumer - an identified caller phoning on behalf of a known consumer or potential consumer.
- Named Caller about an Anonymous Consumer - an identified caller phoning about an anonymous consumer.
- Anonymous Call - neither the consumer nor the caller has been identified.

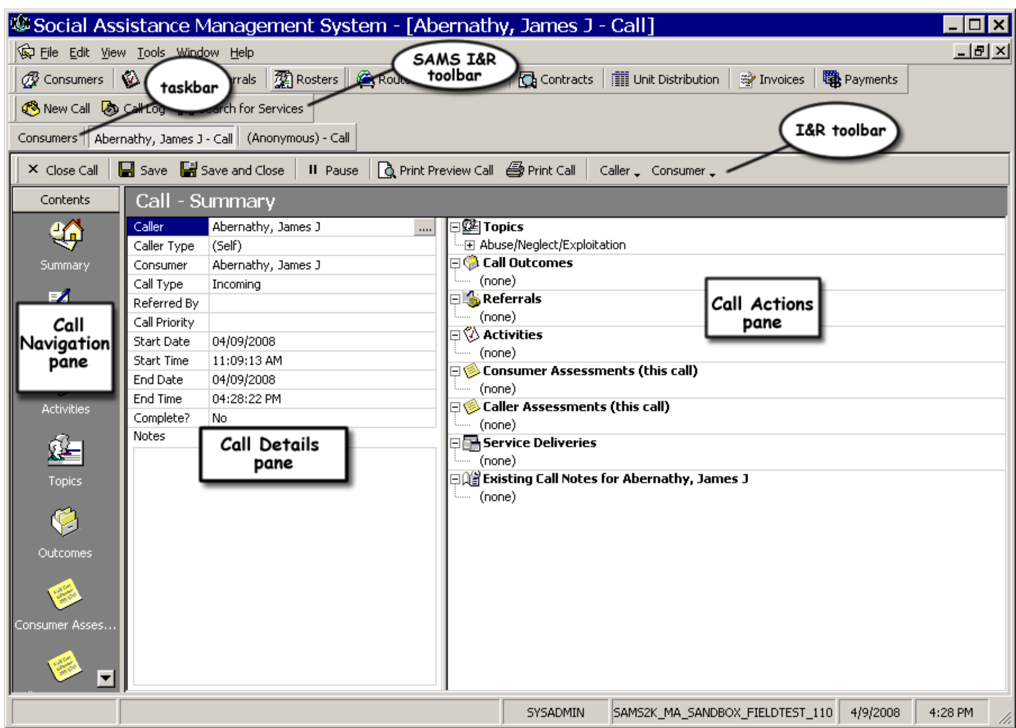
In SAMS I&R, *Anonymous* is the default option for both consumer and caller, making it easy to record these types of calls.

General Call Taking Overview

Start by clicking New Call  on the SAMS I&R toolbar to start the call timer. Select a *Caller*, a *Consumer*, and a *Caller* and *Call Type* using the call details pane. Enter call ***Topics*** (on page 57), search for and create appropriate ***Referrals*** (on page 49), create *Caller* or *Consumer Assessments* (see "Assessments (Call - Summary Screen)" on page 36), add ***Activities*** (see "Entering Activities" on page 34), and record ***Service Deliveries*** (on page 39) using the call actions pane.

Click ***Pause*** (see "Pausing a Call" on page 42) 

on the I&R toolbar to stop a call, or **Resume** to return to a stopped call. SAMS I&R keeps a running timer while the call is paused. You can keep the call open while you use other areas of SAMS by using the taskbar.



Entering a New or Previously Taken Call

The process of entering a call is the same for both named and anonymous consumer/caller. Anonymous call information can only be stored within the call record, and will not be associated with any consumer/caller record.

You do not need to currently be taking a call to enter call records into SAMS I&R. The process of entering an old call is the same as taking a real-time call, except that you manually enter the call start and stop dates and times. However, If your user role does not have permission to modify a call in SAMS I&R, you will not be able to do this.

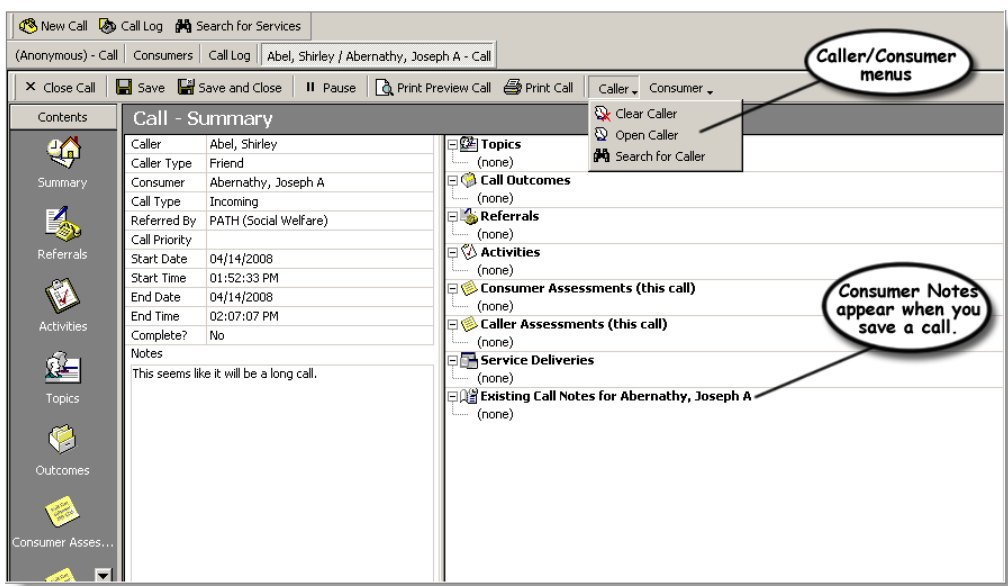
➢ *To enter a call*

1 Click New Call  on the toolbar.

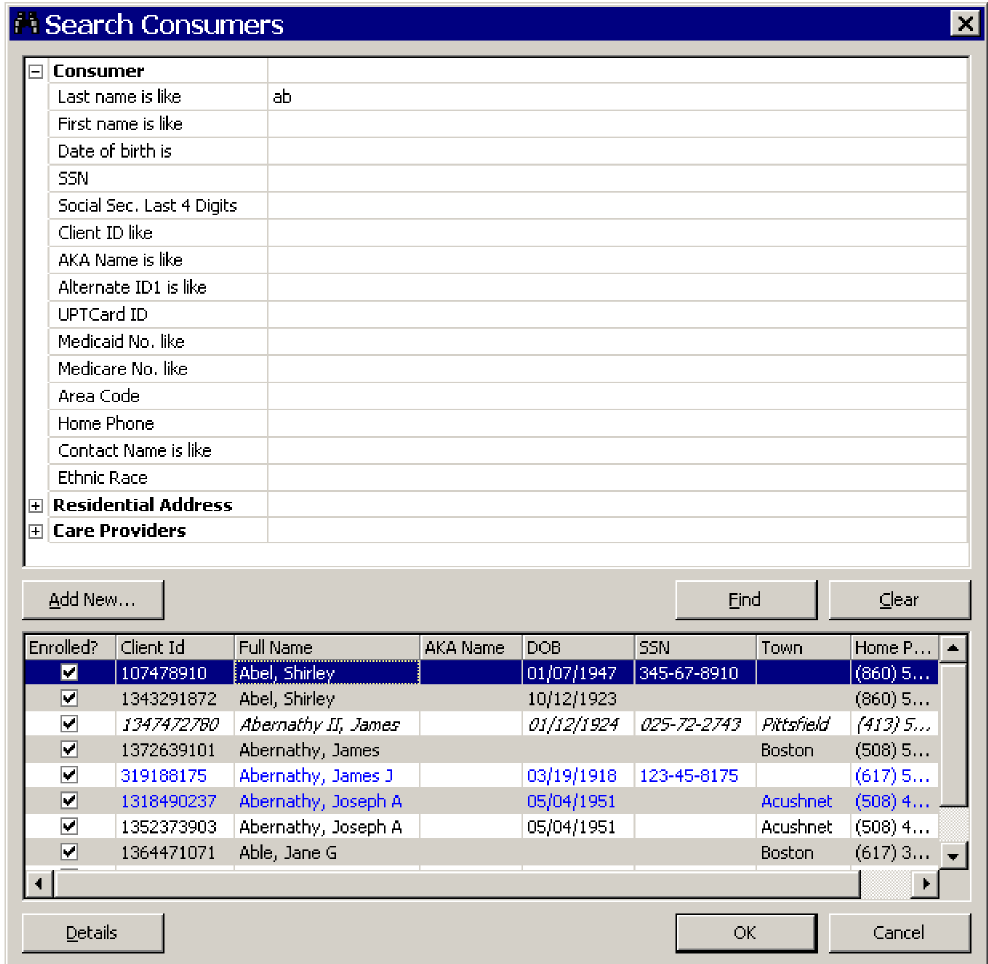
-OR- Right-click in the *Consumers* list and select New Call.

2 Click the Browse  button in the *Caller* row to add a name. Leave *Anonymous* as the default if no name is given.

-OR- Select Search for Caller from the Caller menu.



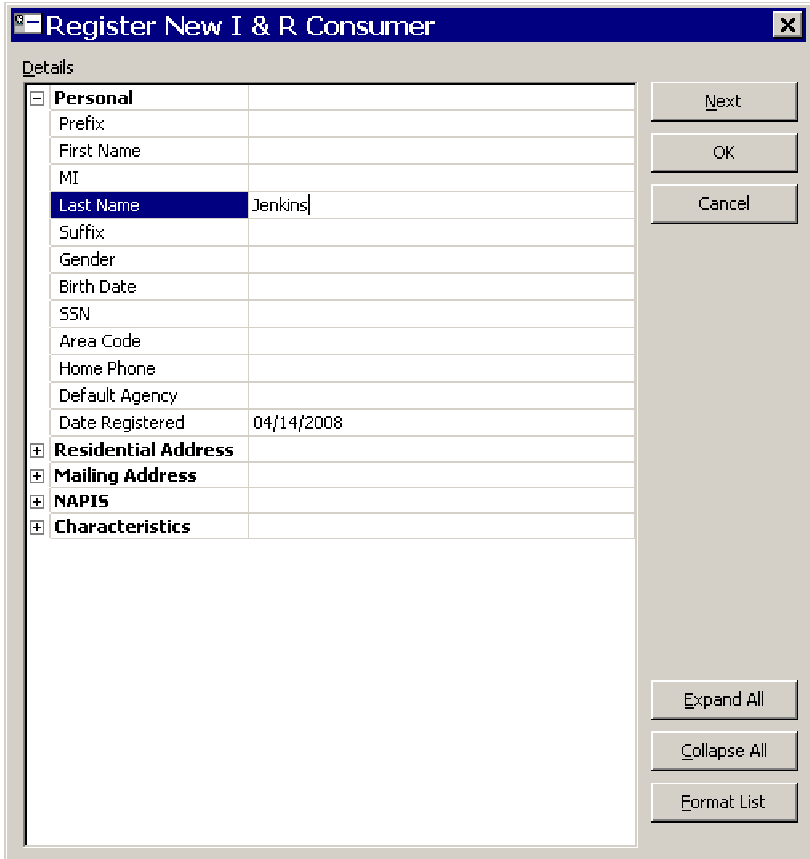
3 In the *Search Consumers* box that appears, enter the first few letters of the caller's last name.



4 Click **Find**.

5 If the caller's name appears in the search results pane at the bottom of the screen, highlight the appropriate record and click **OK**. Skip to step 7. If the caller's name does not appear, proceed to step 6.

6 If the caller does not appear in the search results pane, click Add New. In the *Register New I&R Consumer* box that appears, enter the caller's information as known and click OK. Note that your search criteria is automatically transferred into the *Register New I&R Consumer* dialog.



7 Previous assessments associated with the caller appear in the call actions pane.

Use the Caller or Consumer buttons on the toolbar as necessary to clear a caller/consumer from the call record. The field reverts back to Anonymous.

8 Use the Caller Type list to select the relationship of the caller to the consumer.

9 Repeat steps 1-8 to enter a *Consumer* and *Call Type*.

10 Continue using the lists to select *Referred By* and *Call Priority* as known.

11 SAMS automatically enters the *Start Date*, *Start Time*, *End Date* and *End Time*. You can edit these fields in the Call Log if your user role has permission to do so. See ***Editing a Call*** (on page 46) for more information.

12 Select Yes or No under call *Complete?*. Depending on your ***I&R Settings*** (see "Configuring I&R Settings" on page 4), this field may default to Yes or No, or SAMS may prompt you to make a selection when you save and close the call.

13 Enter any *Notes* as needed. When you access a saved call, any notes you entered for the consumer appear under the *Existing Call Notes* heading appears in the call actions pane for the consumer.

Entering Topics

Topics are the subjects discussed during the course of a call. You can choose multiple topics at once, or come back during the course of a call and add more.

Your user role must have permission to access, create, update, and delete topics.

➢ *To enter a call topic using the call - summary screen*

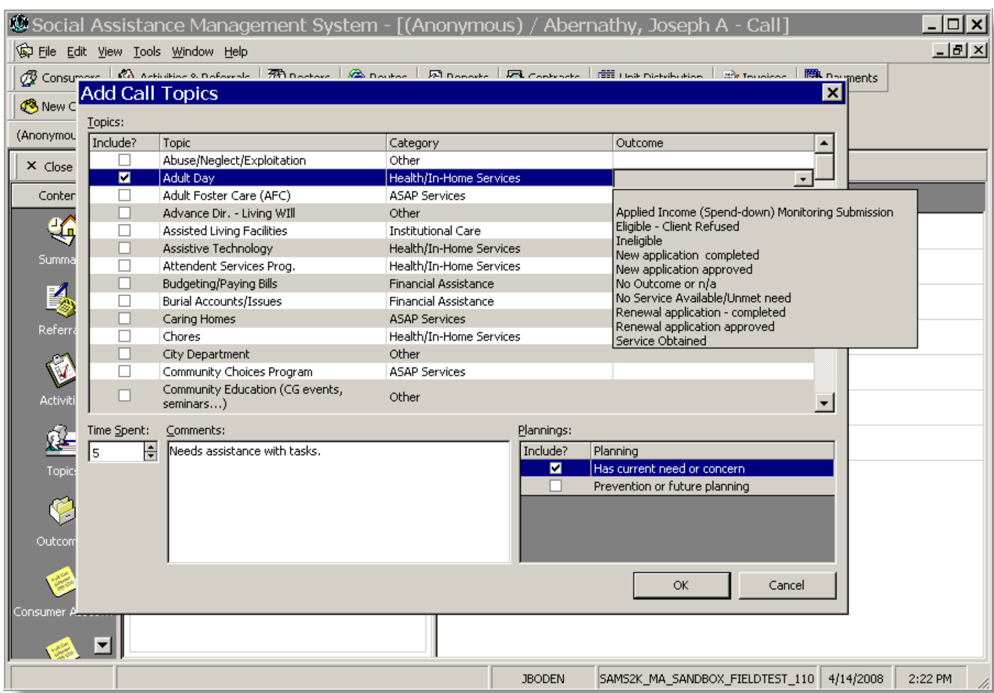
1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click the **Topics** heading in the call actions pane.

3 In the Add Call Topics screen, select the topic(s) that you discussed during the course of the phone call. To quickly locate topics, click the **Topic** category heading and type in the first few letters of the topic.

Click either the **Topic** or **Category** heading to change the alphabetical sort order of the columns.



If you select multiple topics, SAMS I&R copies the same Time Spent, Outcome, and Comments to each record.

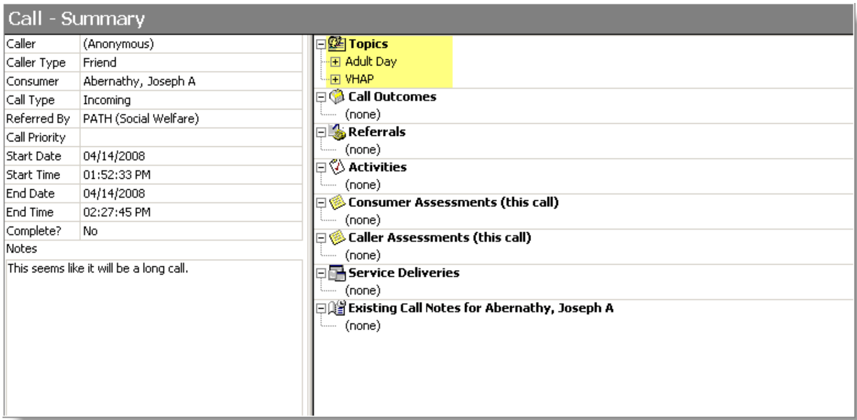
4 Enter the minutes spent for each topic in *Time Spent:*.

5 In the *Outcome* column, use the *Outcome* list to select the topic action that resulted from the call, if possible.

6 Under *Plannings:*, select the appropriate box under *Include?*.

7 Enter any *Comments* as needed.

8 When you are finished, click OK. The topics now appear in the *Call - Summary* screen. Double-click an individual topic to edit it as needed in the *Edit Call Topic* screen. To remove a topic, highlight it and press the DELETE key. Select Yes at the prompt.



Entering Call Outcomes

Call Outcomes refers to the actions that result from a phone call. For instance, a call may refer a consumer to Adult Protective Services or Private Long Term Care services. The *Agency Call Report* displays *Call Outcome* information.

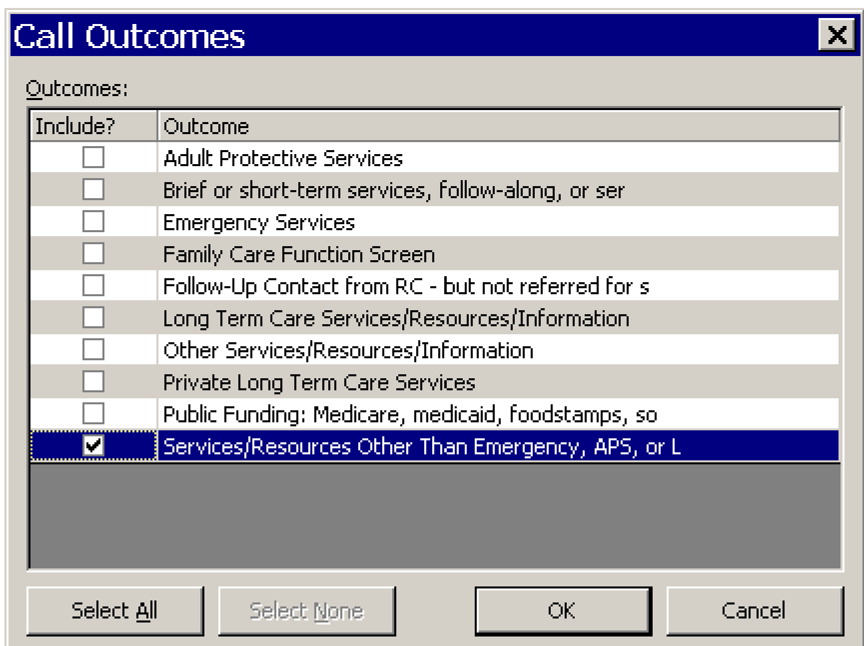
> Your user role must have permission to access, create, update, and delete outcomes.

➤ *To add a call outcome using the call - summary screen*

1 Begin a new call.

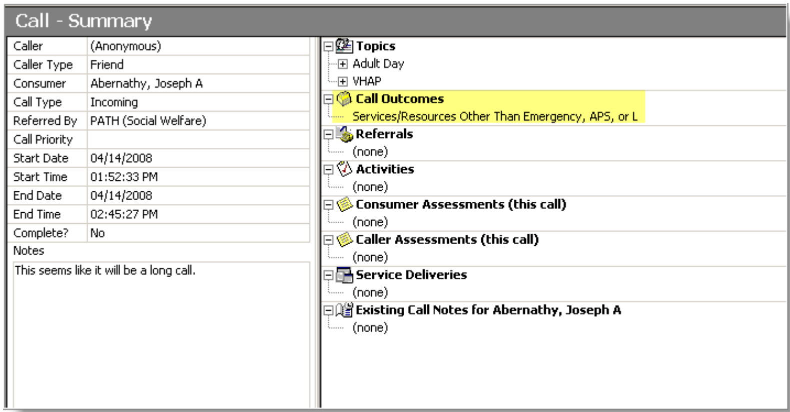
-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click the Call Outcomes heading in the call actions pane.



3 Select the appropriate outcome(s).

4 Click OK. The call outcomes now appear in the *Call-Summary* screen. To edit/delete a call outcome, double-click it and change or deselect it in the *Edit Referral* screen. You can also delete a call outcome by highlighting it and pressing the DELETE key. Select Yes at the prompt.



Creating Referrals

Use ***Referrals*** to search for appropriate services and programs for consumers during the course of a phone call. Access ***Referrals*** through the call actions pane, the call navigation pane, or on the SAMS I&R toolbar. The ***Search for Services*** screen allows you to quickly locate referrals by using a variety of program, site, and/or service search terms.

You can also generate an activity from the ***Search for Services*** screen.

Your user role must have permission to view, create, update, or delete referrals. Additionally, the referrals area is subject to organizational security - meaning that access may be limited by organization.

➢ *To create a referral using the call-summary screen*

1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click the Referrals heading.

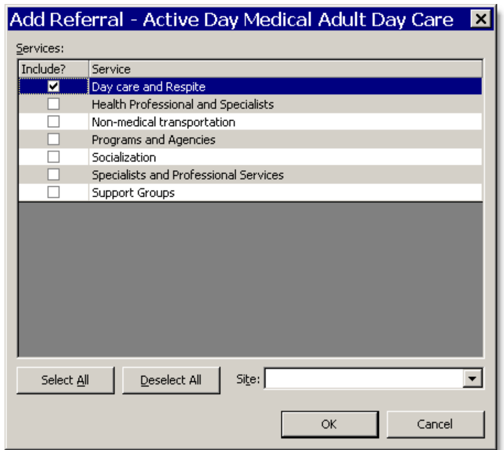
3 In the ***Search for Services*** screen that appears, enter ***Search:*** criteria.

4 The ***Providers:*** column populates with matching criteria. Highlight a provider to populate the ***Details:*** pane with provider/service information.

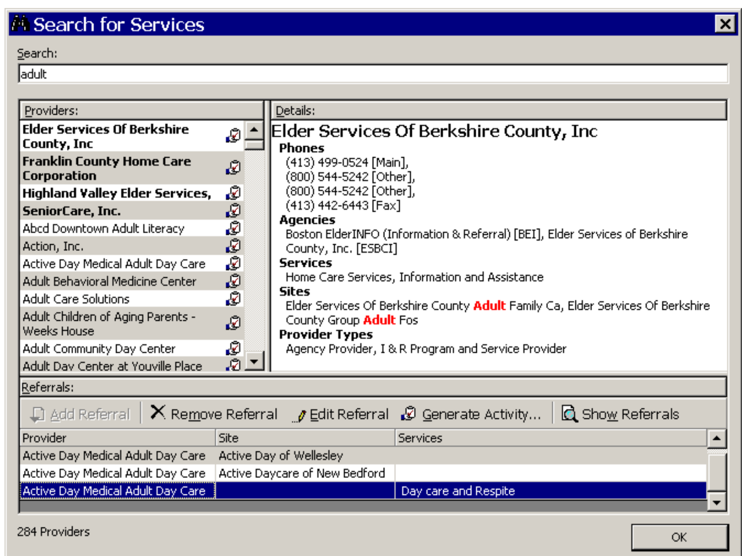
5 Once you find the appropriate provider/service, double-click it.

-OR- Highlight the provider/service and click Add Referral in the ***Referrals:*** pane.

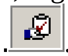
6 In the ***Add Referral*** screen that appears, select the appropriate service(s) by selecting the ***Include?*** box. You can also associate a site with the referral by using the ***Site:*** list.

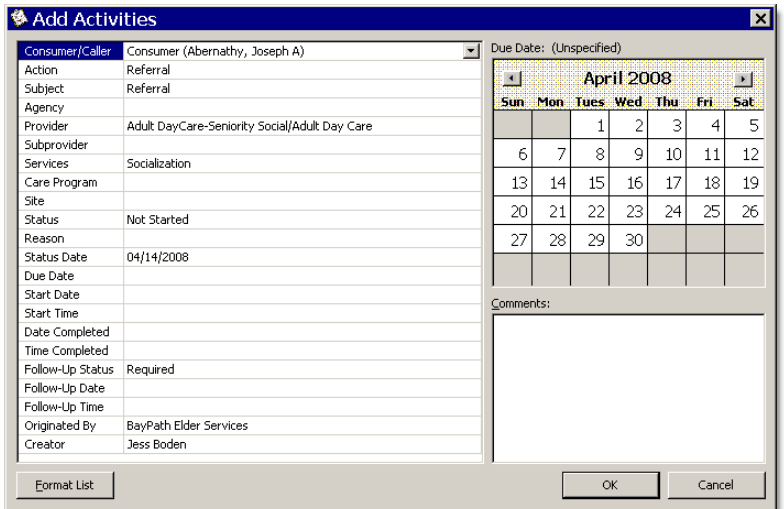


7 Click OK. Your selection(s) appears in the ***Referrals:*** pane. You can also click Cancel to close the ***Add Referral*** screen and search some more if you don't see the information you are looking for.



Use the Show Referrals  button to view the details of an item highlighted in the *Referrals:* pane.

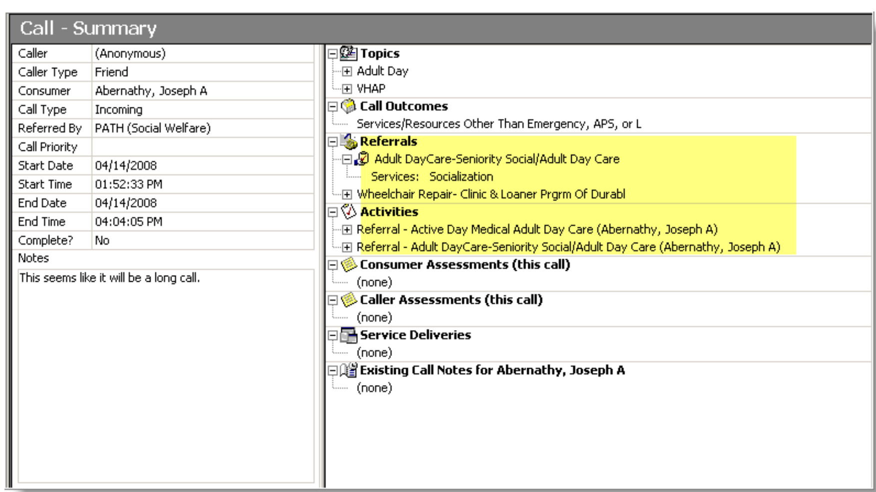
8 If you want to create an activity for a referral, highlight it in the ***Referrals:*** pane and click Generate Activity... . Add information as outlined in ***Entering Activities*** (on page 34) and click OK. The referral appears with a checkmark icon next to it in the ***Referrals:*** pane.



9 Click OK to remove the ***Search for Services*** screen from view.

10 The referral(s) now appear in the ***Call - Summary*** screen. If you added an activity with the referral, the referral appears with a checkmark icon next to it. Additionally, the activities appear under the Activities heading. To edit/delete a referral, double-click it and change or deselect it in the ***Edit Referral*** screen. You can also delete a referral by highlighting it and pressing the DELETE key. Select Yes at the prompt.

Deleting a referral will not delete any activities you created with the referral. You must delete those separately, if necessary.



Entering Activities

Activities are events that happen as a result of, or after, a call. For example, you could send out a brochure as a follow-up activity to a caller who inquired about a specific program.

You cannot create activities for anonymous consumers/callers. Additionally, *Activities* are subject to organizational privilege, which means your user role must have permission to create activities for an agency.

> Your user role must have permission to view, create, update, or delete activities. Additionally, the activities area is subject to organizational security - meaning that access may be limited by organization.

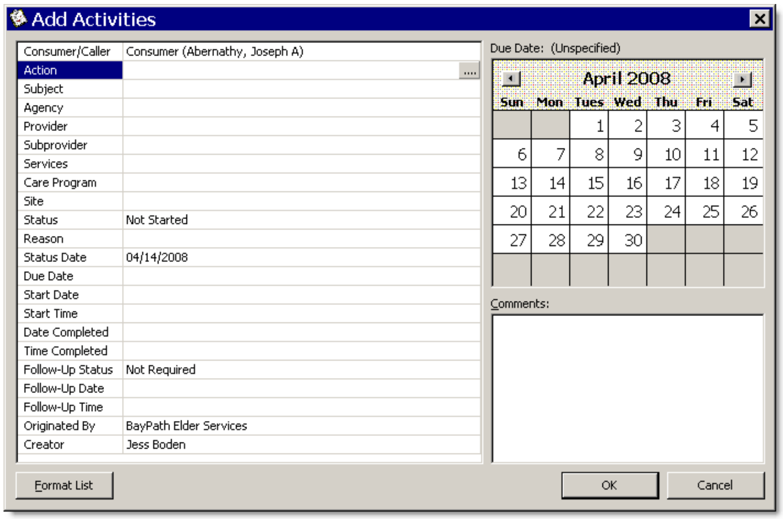
➢ *To create an activity using the call - summary screen*

1 Begin a new call.

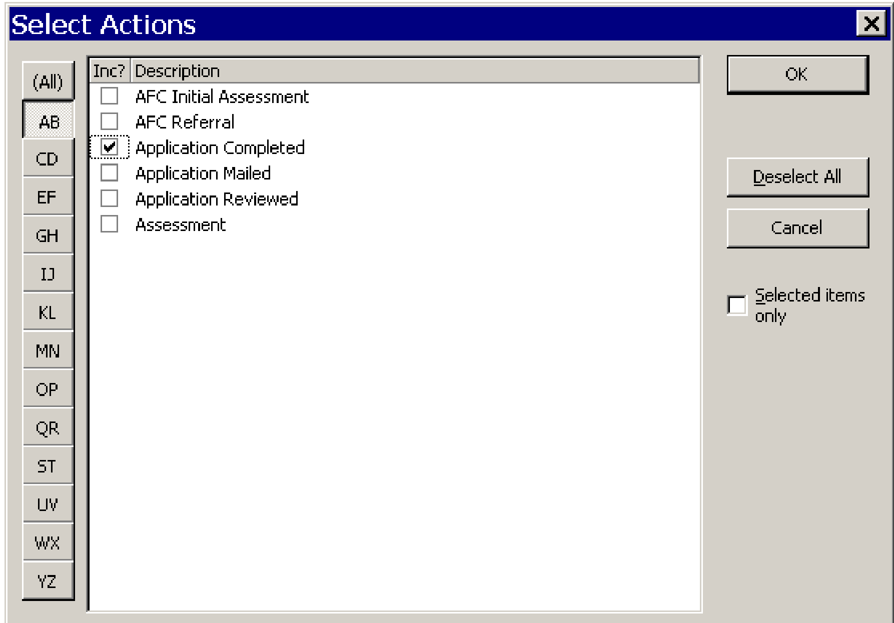
-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click the Activities heading.

3 Use the *Consumer/Caller* list to select either the Consumer or the Caller.

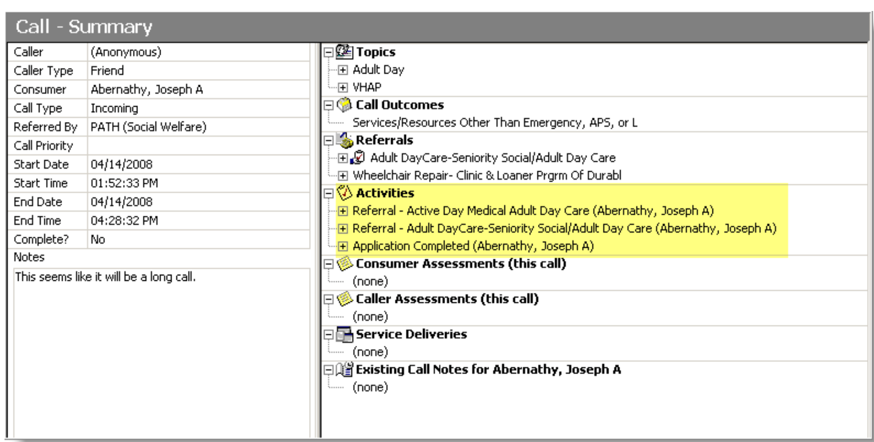


4 Select an *Action(s)* from the *Select Actions* screen and click OK.



5 Enter a *Subject*. Continue adding information as known or as needed, and click OK when finished.

6 The activity now appears in the *Call - Summary* screen. To edit an activity, double-click it and make any necessary changes in the *Edit Activities* screen. To delete an activity, highlight it and press the DELETE key. Select Yes at the prompt.



Assessments (Call - Summary Screen)

Assessments allow you to make informed decisions when making referrals to consumers/callers. Both *Consumer* and *Caller Assessments* store consumer assessment sessions based on forms provided with SAMS and Omnia applications. You can use the program to create new assessments for both named and anonymous consumers/callers. Record an assessment from within a call or from within a consumer/caller record.

When you record an assessment for a named consumer/caller, the assessment can be retrieved from both the *Call Log* and the consumer/caller record. Access assessments for a current caller using the *Call Summary* screen, or for an existing caller through the *I&R Consumer Summary* screen.

In the instance of an anonymous consumer, the assessment you complete will be associated with the call - not an actual person. If both the caller and consumer are anonymous, SAMS I&R only provides you with the option to add a consumer assessment, so that the anonymous caller essentially becomes both the caller and the consumer in the stored call record.

Remember that the goal of an assessment is to be able to gather enough information to make informed referrals for a consumer. With this in mind, even if the caller is named and the consumer is anonymous, you'll want to run an anonymous consumer assessment.

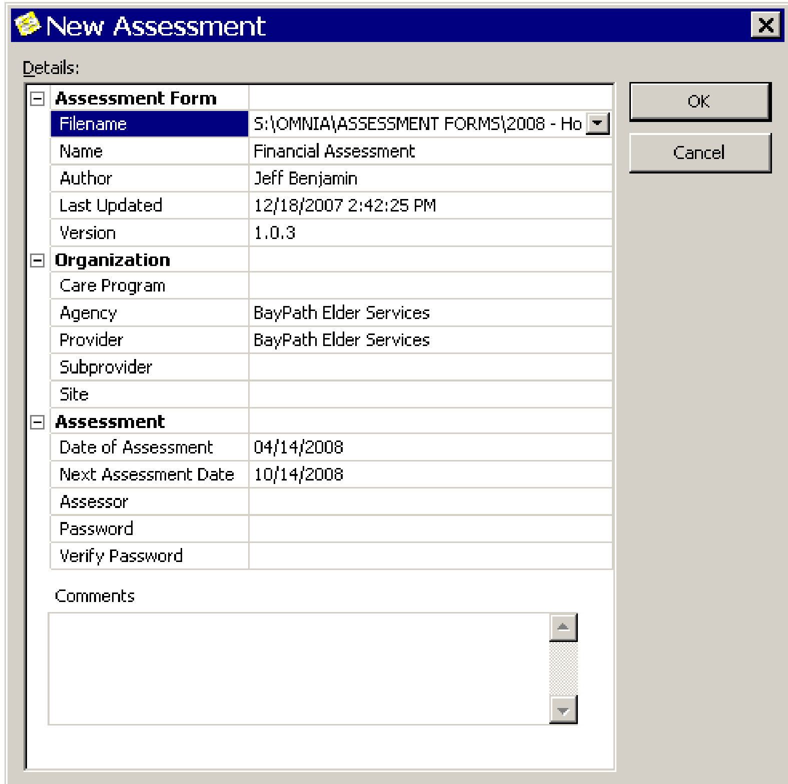
> Your user role must have permission to view, create, update, or delete assessments. Additionally, the assessments area is subject to organizational security - meaning that access may be limited by organization.

➢ *To record an assessment for a consumer/caller*

1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click Consumer or Caller Assessments.



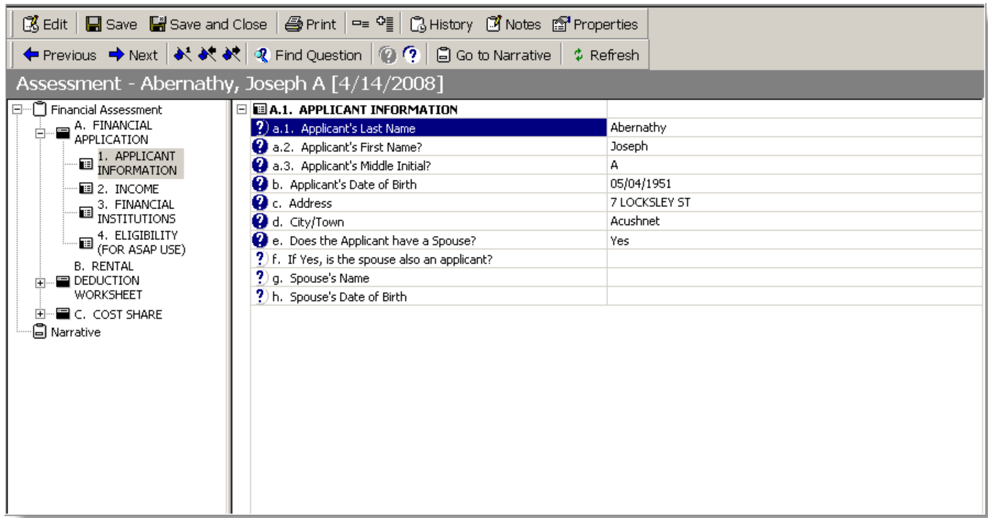
3 Use the *Filename* list to select the appropriate assessment form for this consumer. If there are no forms available, select [Browse..].

4 Enter your name in Assessor. You can choose to password protect this assessment by entering a Password and then entering it again in *Verify Password*. SAMS I&R automatically enters the *Date of Assessment* and *Next Assessment Date* using today's date and the *Reassessment Date* default.

5 Click OK.

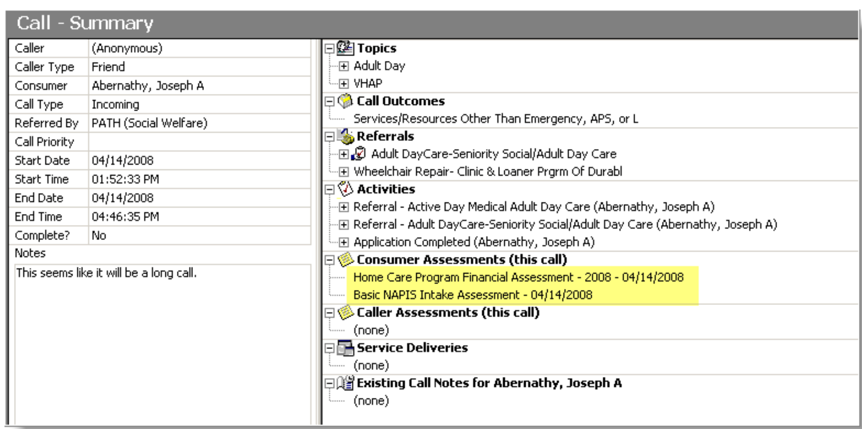
6 SAMS may prompt you that your assessment contains indicators that need to be saved. If the prompt appears, click Yes to continue.

7 Enter data into the assessment as outlined in the SAMS User's Guide or **Help** files. Access the **Help** files by selecting **Search** from the **Help** menu and entering the appropriate terms.



8 When finished, click **Save and Close**.

9 The assessment now appears in the *Call - Summary* screen. To edit an assessment, double-click it and make any changes necessary. To delete an assessment, highlight it and press the DELETE key. Select **Yes** at the prompt.



Service Deliveries

Service Delivery Templates can be used to save different types of service deliveries when saving a call record. You can save services to a consumer, or to a consumer group. The ability to customize how services are recorded in the context of a call is available under ***I&R Settings*** (see "Configuring I&R Settings" on page 4) in the Options menu.

For more information about service templates, including how to add a service template, see the SAMS User's Guide or the SAMS Help files. To access the Help files, select Search from the Help menu and enter '*Service Delivery Templates*' as the search term.

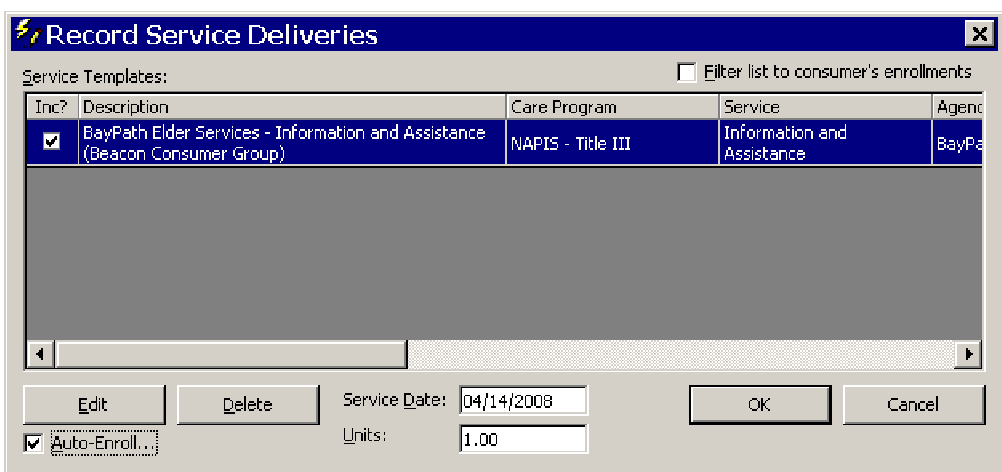
Your user role must have permission to view, create, update, or delete service deliveries. Additionally, service deliveries are subject to organizational security - meaning that access may be limited by organization.

➢ *To add a service delivery to the call - summary screen*

1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Double-click the Service Deliveries heading.



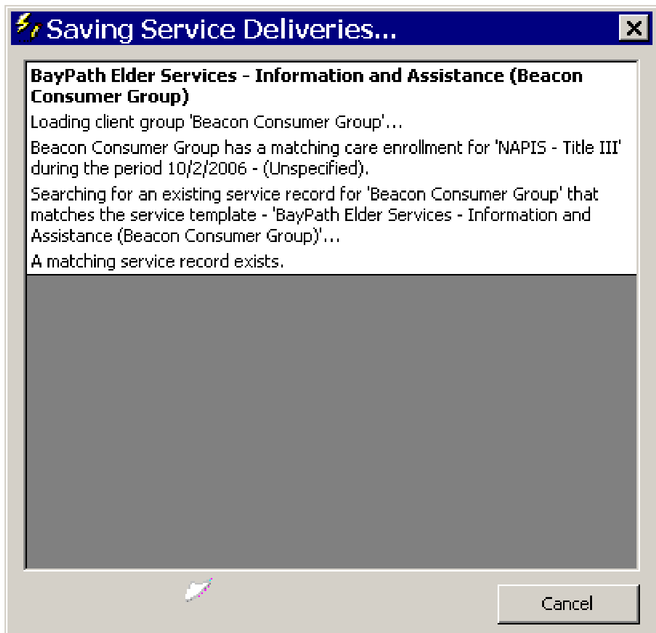
3 Select the Inc? box next to the template you want to include in the *Record Service Deliveries* screen.

4 If the **Filter list to consumer's enrollments** box is selected, the *Record Service Deliveries* screen shows ONLY those enrollments in which the consumer is currently enrolled. Check this box if you do not want to create any new consumer enrollments.

-OR- To automatically enroll the consumer for services that they are not enrolled in, leave the **Filter list to consumer's enrollments** box unselected and check the **Auto-Enroll** box. Select **Yes** at the prompt. This automatically creates/updates the consumer's enrollment record so that the selected services can be delivered.

5 Modify the *Service Date* and the number of *Units*, if necessary.

6 Click **OK**. Wait as your service deliveries are recorded.



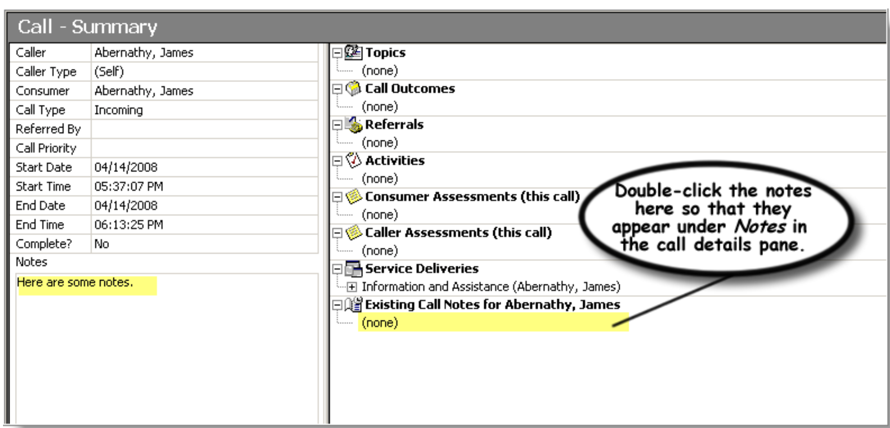
7 Your service deliveries now appear in the *Call - Summary* screen. To edit a service delivery, double-click it and make any necessary changes in the *Service Delivery* screen. Click **Save and Close** when you are done. To delete a service delivery, highlight it and press the DELETE key. Select **Yes** at the prompt.

Editing or Deleting Existing Call Notes

When a user enters notes into the call details pane for a consumer, they are saved with the call. Later, when you access a saved call, the notes appear under the *Existing Call Notes...* heading.

➢ *To edit existing call notes*

1. Access a previously entered call. See ***Editing a Call*** (on page 46)for more information.
2. If there are existing notes for the consumer, they appear under the *Existing Call Notes...* heading in the call actions pane.
3. Double-click the notes. They appear under the *Notes* section in the call details pane.
4. Edit or delete the notes.
5. Save or Save and Close the call.

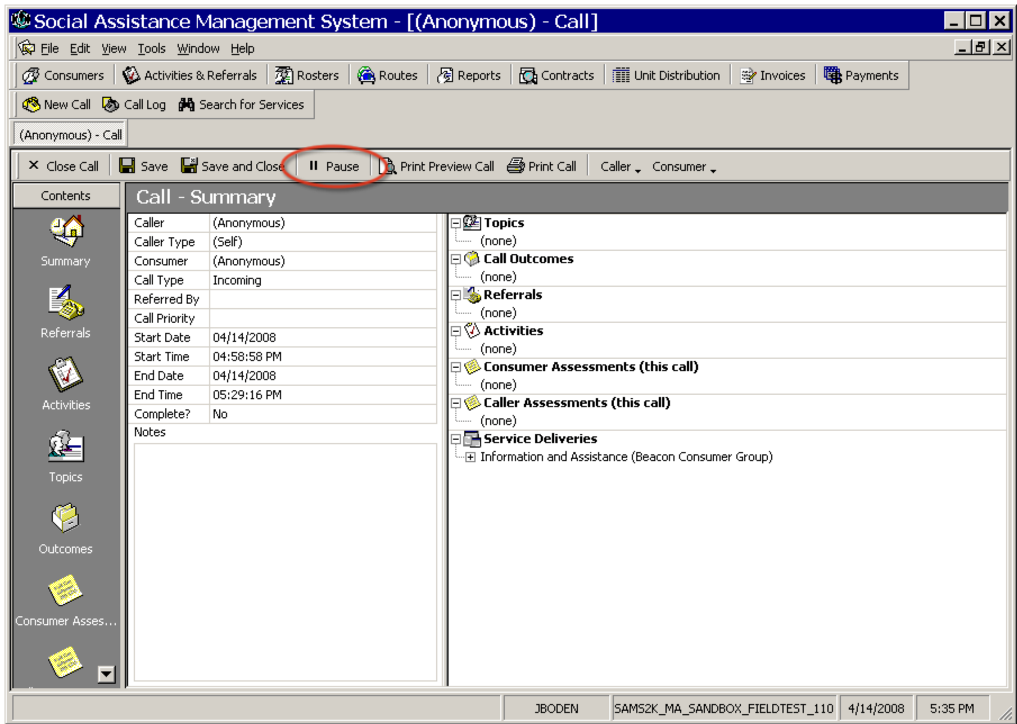


Pausing a Call

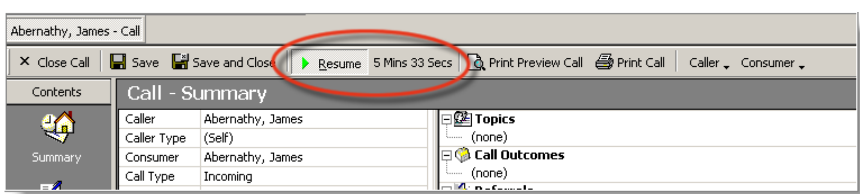
You can pause a call if necessary. The I&R toolbar keeps a running record of the number of seconds for which the call has been paused. You can only pause new calls.

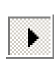
➢ ***To pause the call timer***

1 Start a new call.



2 Click **Pause**  on the toolbar. It switches to **Resume** and a call timer appears.



3 Click **Resume**  when you are ready to resume the call timing.

Printing a Call Summary

To preview the call summary before printing, click Preview Call in step 2. SAMS I&R can prompt you after every call to print a call summary. See ***Configuring I&R Settings*** (on page 4) for more information.

➢ *To print a call summary*

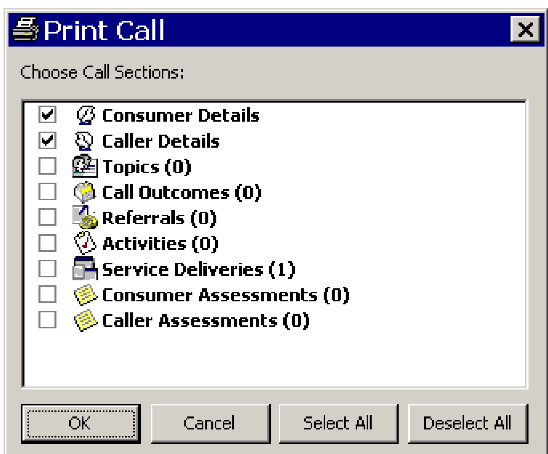
1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Click Print Call  on the toolbar.

-OR- From the File menu, select Print.

3 In the *Print Call* screen, select the Call Sections you would like to print. The *Print Call* screen defaults to the Call Sections you selected last.



4 Click OK.

5 If necessary, select a printer and click Print.

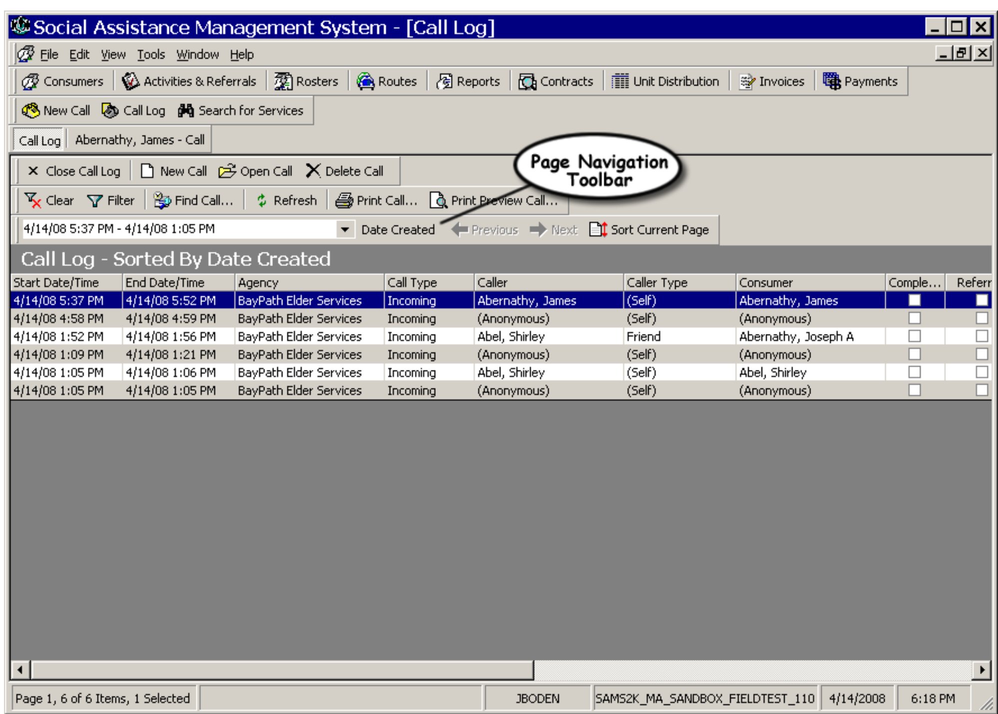
Using the Call Log

SAMS I&R stores call records in a *Call Log*. Use the call log to edit or delete previously entered calls. The call log can also print summaries of individual calls.

You change the different sections of a call record (topics, referrals, etc) using the same procedures as when the call was entered. See ***Call Taking Overview*** (on page 21) for more information.

You can customize the *Call Log* view just as you can any other list screen in SAMS, to include adding and removing columns. See the SAMS User's Guide or the SAMS **Help** files for more information about customizing the screen. To access the **Help** files, select **Search** from the **Help** menu and enter the appropriate search terms - e.g. 'sorting pages.'

> Your user role must have permission to view, create, update, or delete a call history in order to use the call log. Additionally, the call log is subject to organizational security - meaning that access may be limited by organization.



Finding a Call in the Log

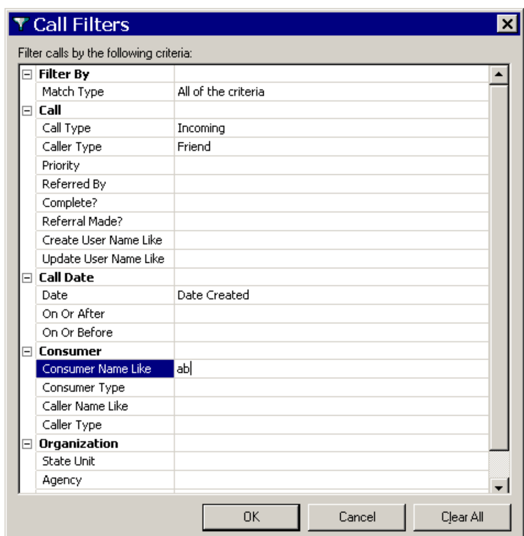
You may need to find a particular call in the log to modify a note or to edit an activity. SAMS I&R gives you the ability to search for a call record in many different ways: by call details, date, consumer, and organization.

You can also click the title of a column to have SAMS re-sort the call records by the information found in that column. For instance, clicking the *Caller* title will sort all the records alphabetically by caller name.

➢ *To use the call filter*

1 Click **Call Log** on the SAMS I&R toolbar.

2 Click **Filter** on the toolbar.



3 Enter information in as many fields as necessary. If your search is turning up no or only a small number of records, try creating broader search filters.

Click **Clear All** to remove information from all the fields.

4 Click **OK**.

5 SAMS I&R filters the *Call Log* list so that it displays only those records that meet your filter criteria.

Editing a Call

➢ *To edit a call in the call log*

1. Click Call Log on the SAMS I&R toolbar.
2. Find and highlight the appropriate record in the *Call Log* screen - see ***Finding a Call in the Log*** (on page 45).
3. Click Open Call  on the toolbar.

   -OR- Right-click and chose Open Call.... -OR- CTRL+O. -OR- Double-click it.

4. Enter or modify information about the call as outlined in ***Call Taking Overview*** (on page 21).
5. When finished, Save and Close the call.
6. To close the *Call Log*, click Close Call Log on the toolbar.

   -OR- From the File menu, select Close Call Log.

Removing a Call

➢ *To remove a call from the call log*

1. Click Call Log on the SAMS I&R toolbar..
2. Find and highlight the appropriate record in the *Call Log* screen - see ***Finding a Call in the Log*** (on page 45).
3. Click Delete Call on the toolbar.

   -OR- Right-click and select Delete Call. -OR- CTRL+D.

4. At the prompt, click Yes to confirm or No to cancel.

Printing from the Call Log

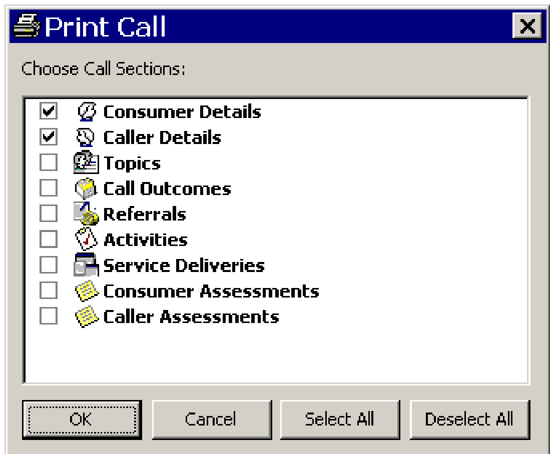
➢ *To print a call summary from the call log*

1. Click Call Log on the SAMS I&R toolbar.
2. Find and highlight the appropriate record in the *Call Log* screen - see ***Finding a Call in the Log*** (on page 45).

3 Highlight the appropriate record or records. Hold down the CTRL (control) key when selecting to choose multiple records.

4 Click Print Call  on the toolbar.

-OR- Right-click and select Print Call. -OR- CTRL+P.



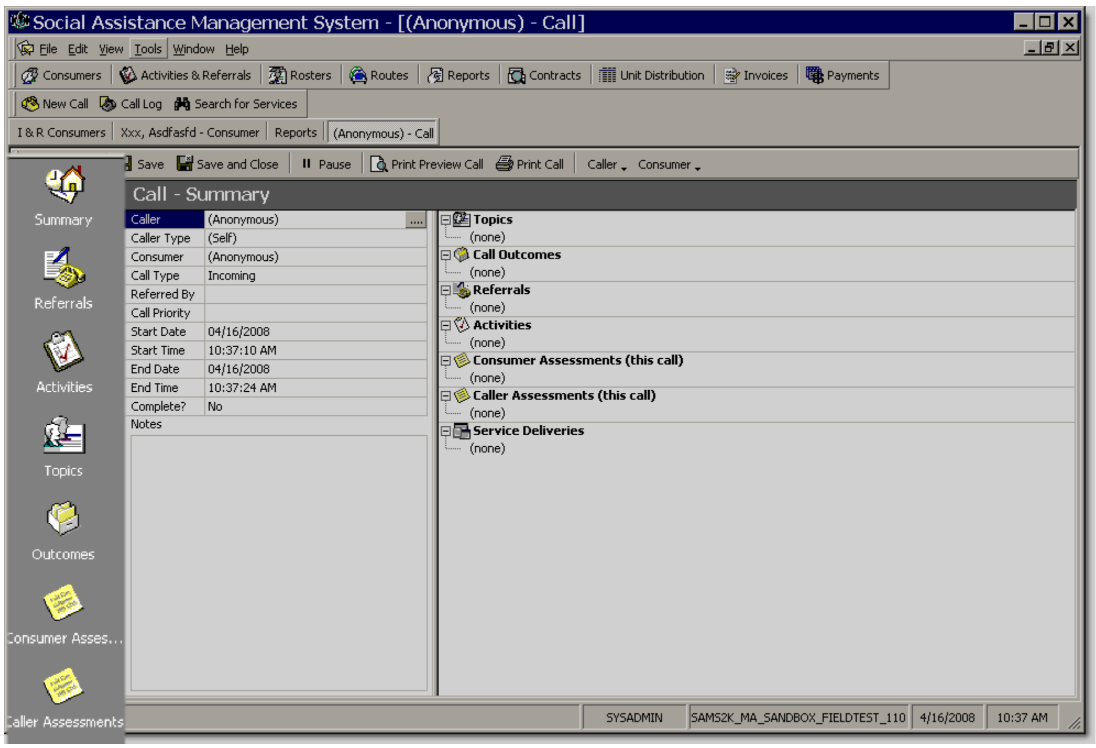
5 Select the Call Sections you want to print.

6 Click OK.

7 If necessary, select a printer and click Print.

Call Navigation Pane

The ***Call - Summary Screen*** (on page 20) section describes how to navigate a call from that screen. However, as we touched upon in that section, you can access most of the same areas to the left of the *Call - Summary* screen in the call navigation pane. This section takes you through entering call information using the call navigation pane. We suggest using the call actions pane for maximum efficiency, though, as using the call navigation pane requires extra steps.

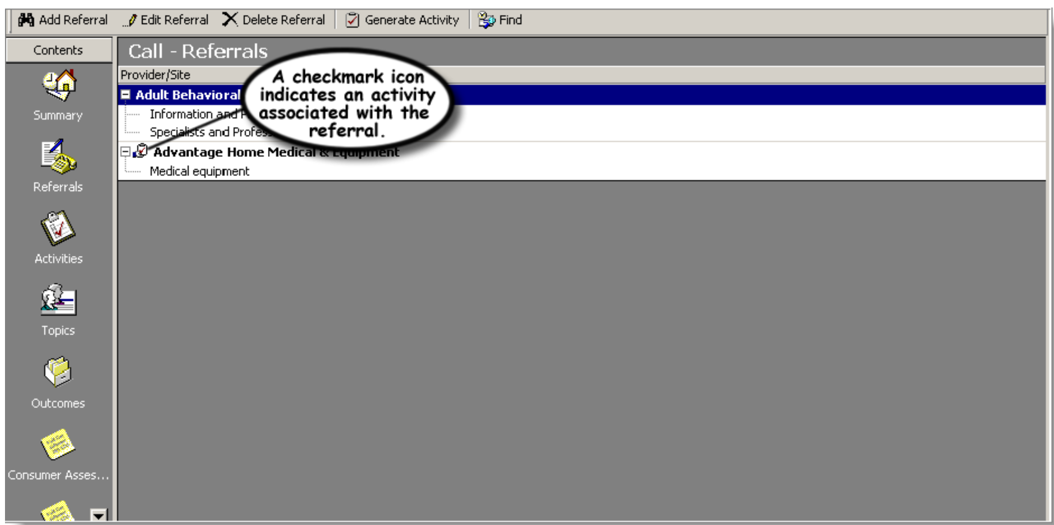


Referrals

This section looks at creating, editing, and deleting a referral from the *Call - Referrals* screen. You can also add ***Activities*** (see "Entering Activities" on page 34) from a referral.

Use *Referrals* to search for appropriate services and programs for consumers during the course of a phone call. Referrals can also be added in the ***Call - Summary Screen*** (on page 20) call actions pane and on the SAMS I&R toolbar.

> Your user role must have permission to view, create, update, or delete referrals. Additionally, the referrals area is subject to organizational security - meaning that access may be limited by organization.



➢ *To add a referral in call - referrals screen*

1 Begin a new call.

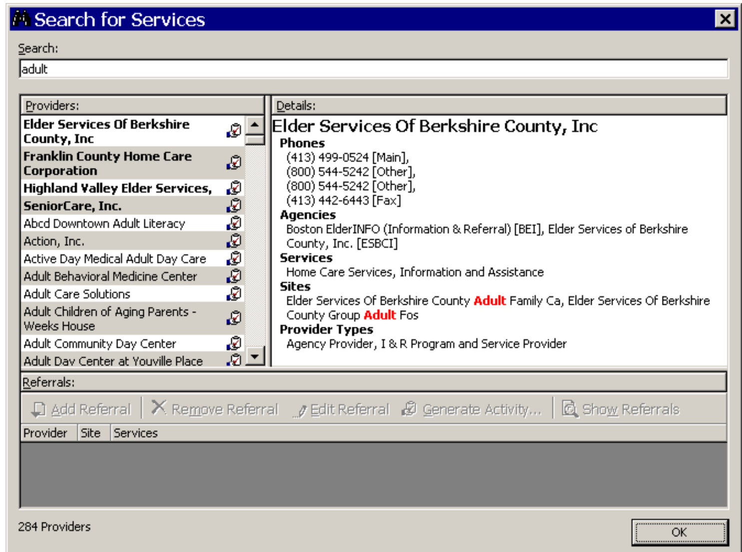
-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Click Referrals in the call navigation pane.

3 Click Add Referral on the toolbar

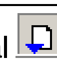
-OR- Right-click and select Add Referral. -OR- Select Add Referral from the File menu.-OR- CTRL+N.

4 In the *Search for Services* screen that appears, just enter *Search:* words. SAMS automatically begins loading appropriate referrals.



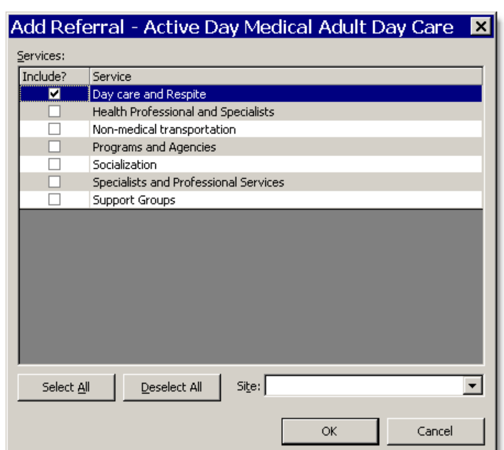
5 The *Providers:* column populates with matching criteria. Highlight a provider to populate the *Details:* pane with provider/service information.

6 Once you find the appropriate provider/service, double-click it.

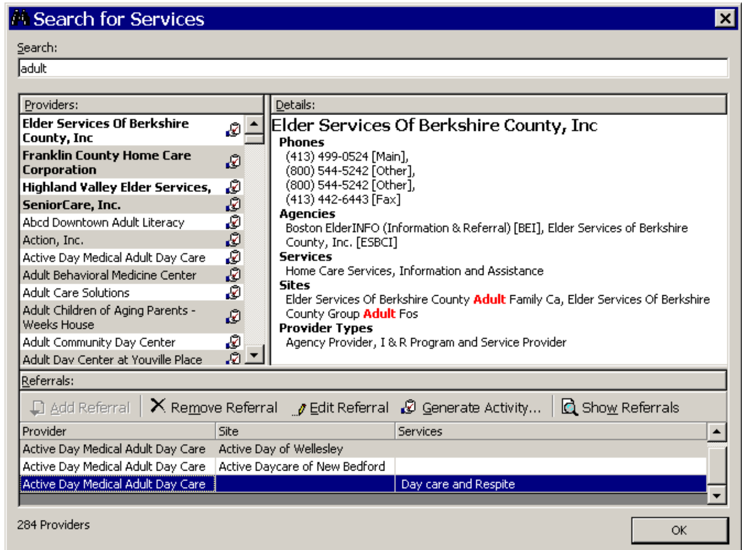
-OR- Highlight the provider/service and click Add Referral  in the *Referrals:* pane.

---

7 In the *Add Referral* screen that appears, select the appropriate service(s) by selecting the *Include?* box. You can also associate a site with the referral by using the *Site:* list.



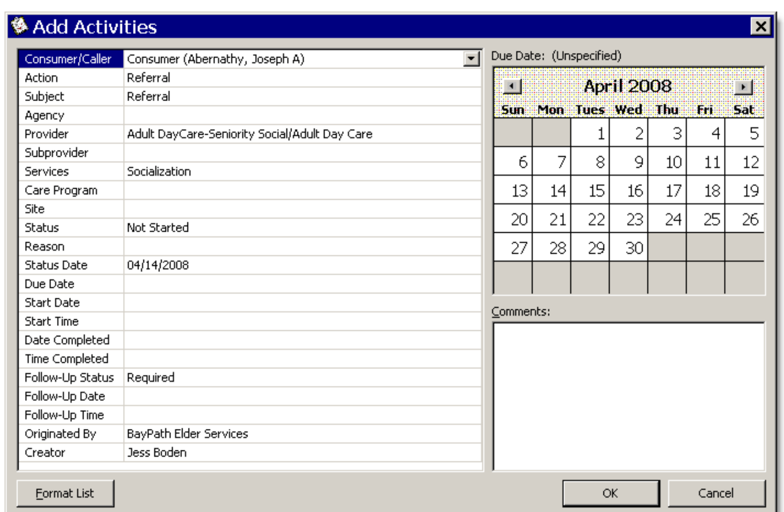
8 Click OK. Your selection(s) appears in the *Referrals:* pane. You can also click Cancel to close the *Add Referral* screen and search some more if you don't see the information you are looking for.



Use the **Show Referrals**  button to view the details of an item highlighted in the *Referrals:* pane.

9 If you want to create an activity for a referral, highlight it in the *Referrals:* pane and click Generate Activity... . Add information as outlined in ***Entering Activities*** (on page 34) and click OK. The referral appears with a checkmark icon next to it in the *Referrals:* pane. To create activities, your user role must have permission to do so.

You can also add an activity for the referral later by clicking Generate Activity on the toolbar.



10 Click OK to remove the *Search for Services* screen from view.

11 The referral(s) now appear in the *Call - Referrals* screen. If you added an activity with the referral, the referral appears with a checkmark icon next to it. Additionally, the activities appear in the **Activities** area.

Deleting a referral will not delete any activities you created with the referral. You must delete those separately, if necessary.

➢ *To edit a referral in the call - referrals screen*

1 Access an existing call. See ***Editing a Call*** (on page 46).

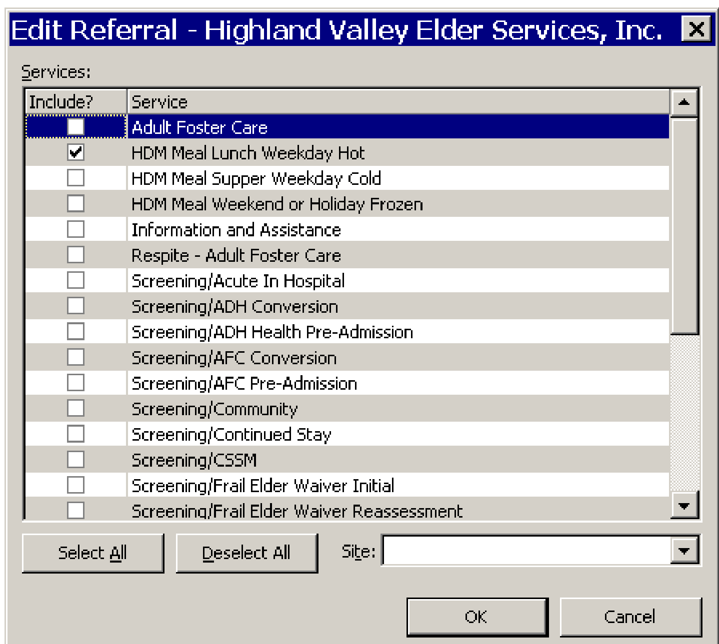
2 Click **Referrals** in the call navigation pane.

3 Highlight the referral you want to change and click **Edit** on the toolbar.

-OR- Select **Edit** from the **File** menu. -OR- CTRL+O.

---

4 In the *Edit Referral* screen, select a new *Service*. You can also deselect the service without choosing another. Modify the *Site:* if necessary.



5 Click **OK**.

➢ *To remove a referral in the call - referrals screen*

1. Access an existing call.
2. Click **Referrals** in the call navigation pane.
3. Highlight the referral you want to change and click **Delete Referral** on the toolbar.

   -OR- Right-click and select **Delete Referral**. -OR- CTRL+D.
4. Select **Yes** at the prompt.

Activities

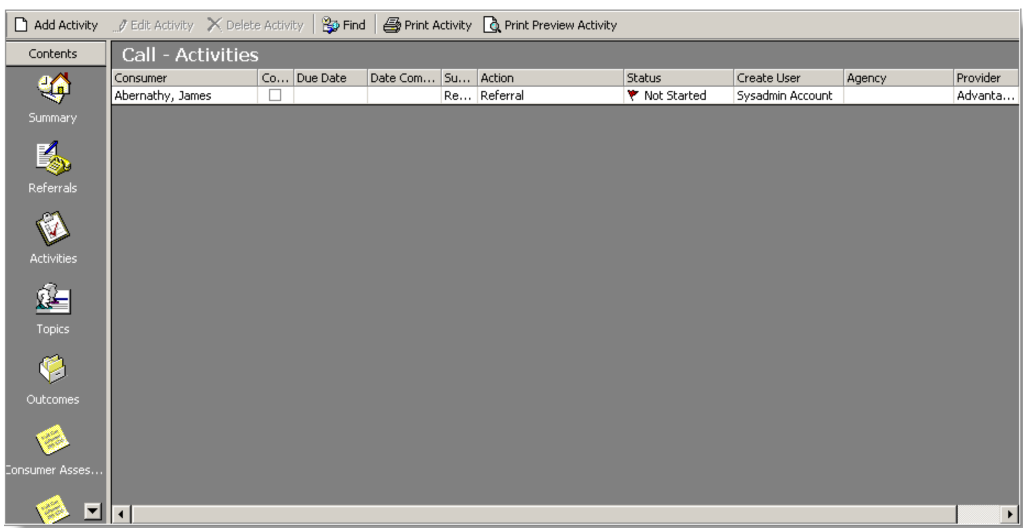
Activities are events that happen as a result of, or after, a call. For example, you could send out a brochure as a follow-up activity to a caller who inquired about a specific program.

Activities can also be generated from ***Referrals*** (see "Creating Referrals" on page 30).

You cannot create activities for anonymous consumers/callers. Additionally, *Activities* are subject to organizational privilege, which means your user role must have permission to create activities for an agency.

This section looks at adding, editing, and deleting activities from the *Call - Activities* screen.

> Your user role must have permission to view, create, update, or delete activities. Additionally, the activities area is subject to organizational security - meaning that access may be limited by organization.



➢ *To add an activity from the call - activities screen*

1. Begin a new call.

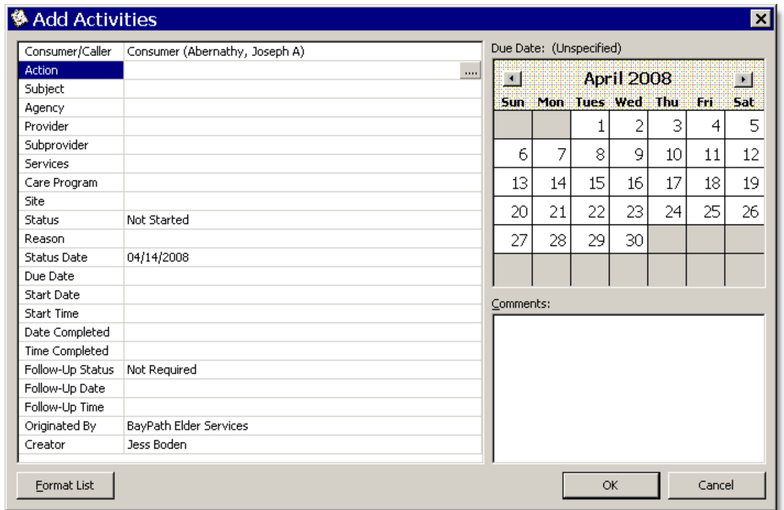
   -OR- Access an existing call. See ***Editing a Call*** (on page 46).

2. Click **Activities** in the call navigation pane.

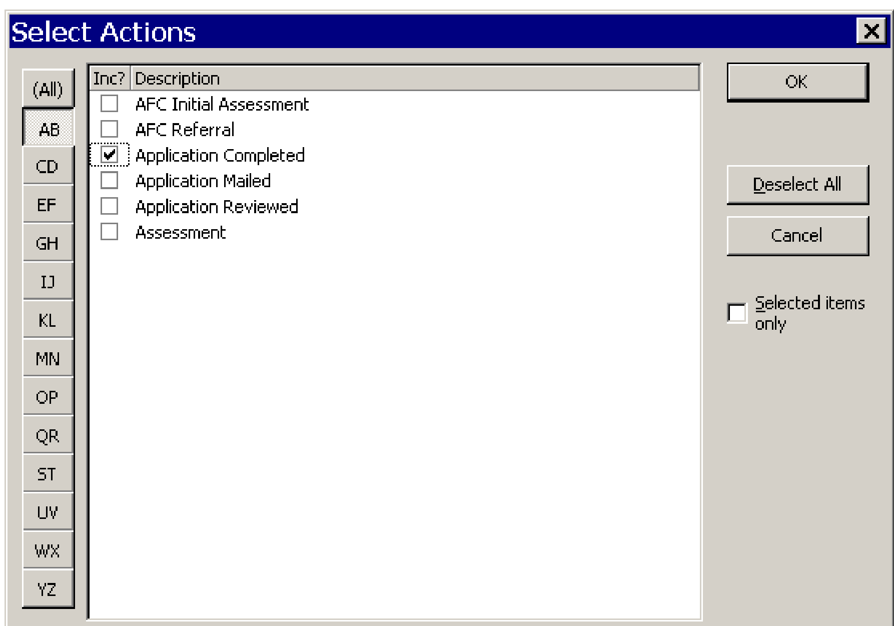
3 Click **Add Activity** on the toolbar

-OR- Right-click and select **Add Activity**. -OR- Select **Add Activity** from the **File** menu.-OR- CTRL+N.

4 Use the *Consumer/Caller* list to select either the **Consumer** or the **Caller**.



5 Select an *Action(s)* from the *Select Actions* screen and click **OK**.



6 Enter a *Subject*. Continue adding information as known or as needed, and click **OK** when finished.

➢ *To edit an activity in the call - activities screen*

1. Access an existing call. See ***Editing a Call*** (on page 46).
2. Click **Activities** in the call navigation pane.
3. Highlight the activity you want to change and click **Edit Activity** on the toolbar

   -OR- Right-click and select **Edit Activity**. -OR- Select **Edit Activity** from the **File** menu.-OR- CTRL+O.

4. Modify the activity as needed.
5. Click **OK**.

➢ *To delete an activity in the call - activities screen*

1. Access an existing call.
2. Click **Activities** in the call navigation pane.
3. Highlight the activity you want to remove and click **Delete Activity** on the toolbar

   -OR- Right-click and select **Delete Activity**. -OR- Select **Delete Activity** from the **File** menu.-OR- CTRL+D.

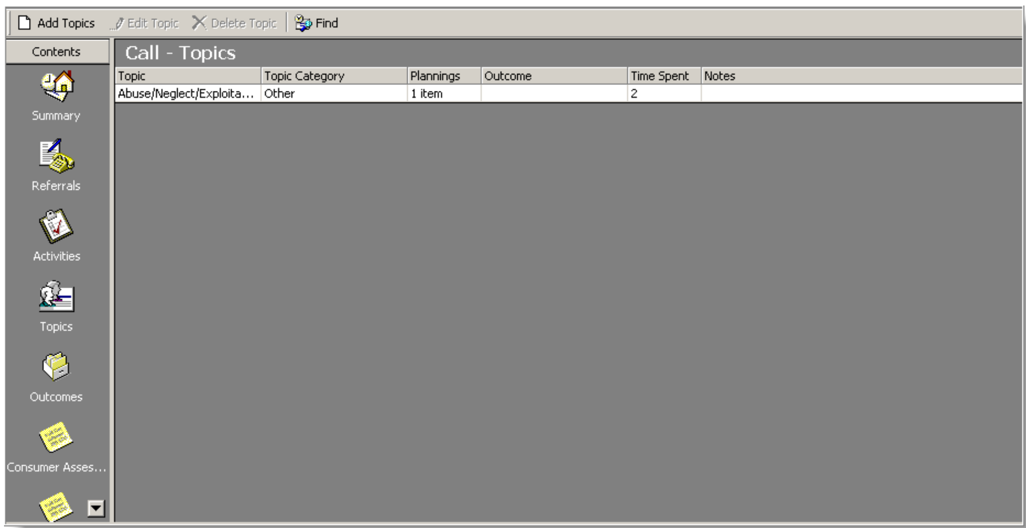
4. Select **Yes** at the prompt.

Topics

Topics are the subjects discussed during the course of a call. You can choose multiple topics at once, or come back during the course of a call and add more.

This section looks at adding, editing, and deleting topics in the *Call - Topics* screen.

> Your user role must have permission to access, create, update, and delete topics.



➢ *To enter a call topic using the call - topics screen*

1 Begin a new call.

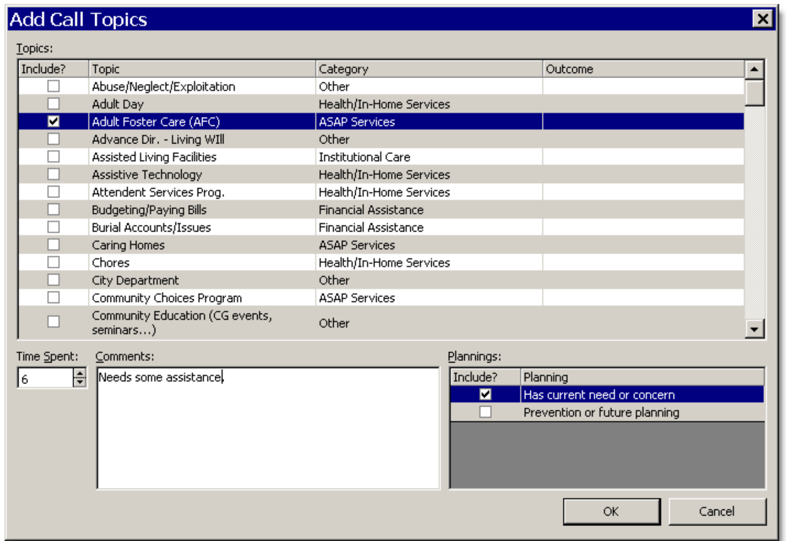
-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Click **Topics** in the call navigation pane.

3 Click **Add Topics** on the toolbar.

-OR- Right-click and select **Add Topics**. -OR- Select **Add Topics** from the **File** menu. -OR-CTRL+N.

Click either the **Topic** or **Category** heading to change the alphabetical sort order of the columns.



If you select multiple topics, SAMS I&R copies the same Time Spent, Outcome, and Comments to each record.

4 Enter the minutes spent for each topic in *Time Spent:*.

5 In the *Outcome* column, use the *Outcome* list to select the topic action that resulted from the call, if possible.

6 Under Plannings:, select the appropriate box under *Include?*.

7 Enter any *Comments* as needed.

8 When you are finished, click **OK**.

➢ *To edit topics in the call - topics screen*

1 Access an existing call.

2 Click **Topics** in the call navigation pane.

3 Highlight the topic you want to change and click **Edit Topic** on the toolbar

-OR- Right-click and select **Edit Activity**. -OR- Select **Edit Activity** from the **File** menu.-OR- CTRL+O.

4 Modify the topic as needed.

5 Click **OK**.

➢ *To delete an activity in the call - topics screen*

1. Access an existing call.
2. Click **Topics** in the call navigation pane.
3. Highlight the topic you want to remove and click **Delete Topic** on the toolbar

   -OR- Right-click and select **Delete Topic**. -OR- Select **Delete Topic** from the **File** menu.-OR- CTRL+D.

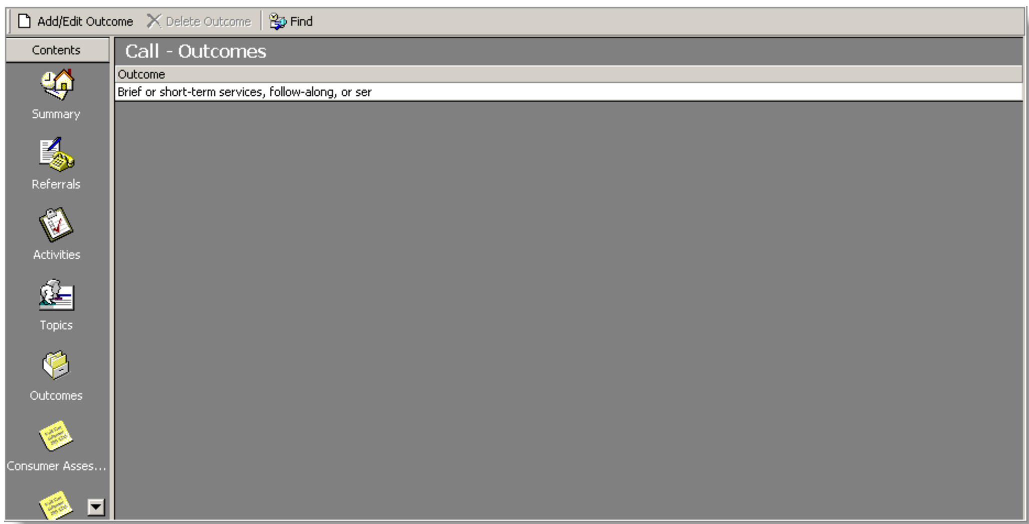
4. Select **Yes** at the prompt.

Outcomes

Call Outcomes refers to the actions that result from a phone call. For instance, a call may refer a consumer to Adult Protective Services or Private Long Term Care services. The *Agency Call Report* displays *Call Outcome* information.

This section looks at adding, editing, and deleting outcomes from the *Call - Outcomes* screen.

> Your user role must have permission to access, create, update, and delete outcomes.



➢ *To add/edit a call outcome using the call - outcomes screen*

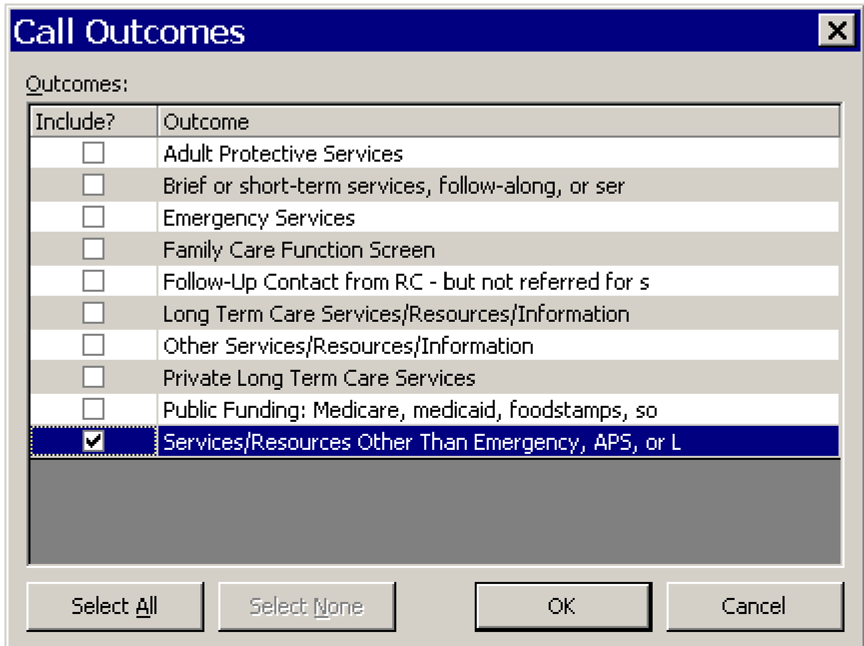
1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Click Outcomes in the call navigation pane.

3 To add/edit a call outcome, highlight any outcome and click **Add/Edit Outcome** on the toolbar.

-OR- Right-click and select **Add/Edit Outcome**. -OR- Select **Add/Edit Outcome** from the **File** menu. -OR- CTRL+N.



4 Select/deselect the appropriate outcome(s).

5 Click **OK**.

➢ *To delete an activity in the call - outcomes screen*

1 Access an existing call.

2 Click **Outcomes** in the call navigation pane.

3 Highlight the outcome you want to remove and click **Delete Outcome** on the toolbar

-OR- Right-click and select **Delete Outcome**. -OR- Select **Delete Outcome** from the **File** menu.-OR- CTRL+D.

4 Select **Yes** at the prompt.

Assessments

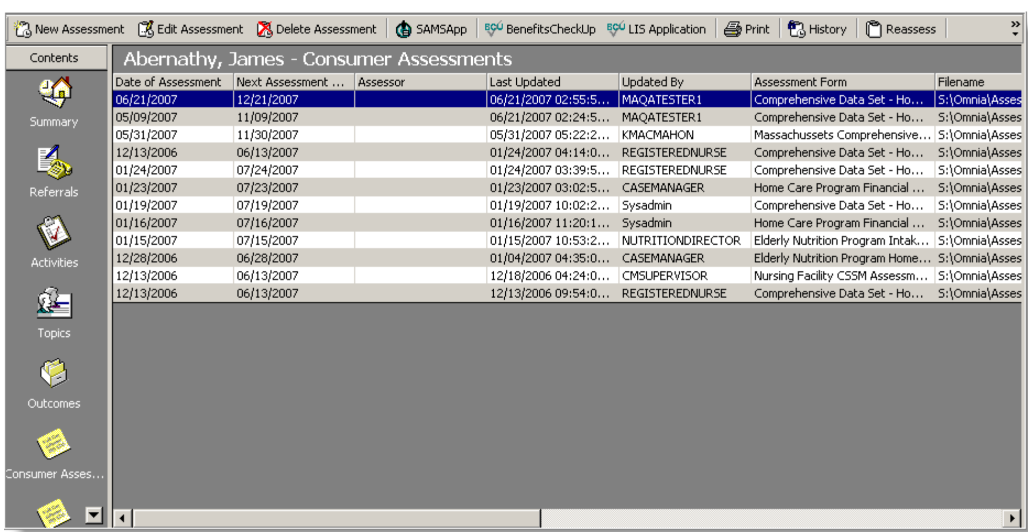
Assessments allow you to make informed decisions when making referrals to consumers/callers. Both *Consumer* and *Caller Assessments* store consumer assessment sessions based on forms provided with SAMS and Omnia applications. You can use the program to create new assessments for both named and anonymous consumers/callers. Record an assessment from within a call or from within a consumer/caller record.

When you record an assessment for a named consumer/caller, the assessment can be retrieved from both the *Call Log* and the consumer/caller record. Access assessments for a current caller using the *Call - Summary* screen, or for an existing caller through their *Consumer - Summary* screen.

In the instance of an anonymous consumer, the assessment you complete will be associated with the call - not an actual person. If both the caller and consumer are anonymous, SAMS I&R only provides you with the option to add a consumer assessment, so that the anonymous caller essentially becomes both the caller and the consumer in the stored call record.

Remember that the goal of an assessment is to be able to gather enough information to make informed referrals for a consumer. With this in mind, even if the caller is named and the consumer is anonymous, you'll want to run an anonymous consumer assessment.

> Your user role must have permission to view, create, update, or delete assessments. Additionally, the assessments area is subject to organizational security - meaning that access may be limited by organization.



➢ *To record an assessment for a consumer/caller*

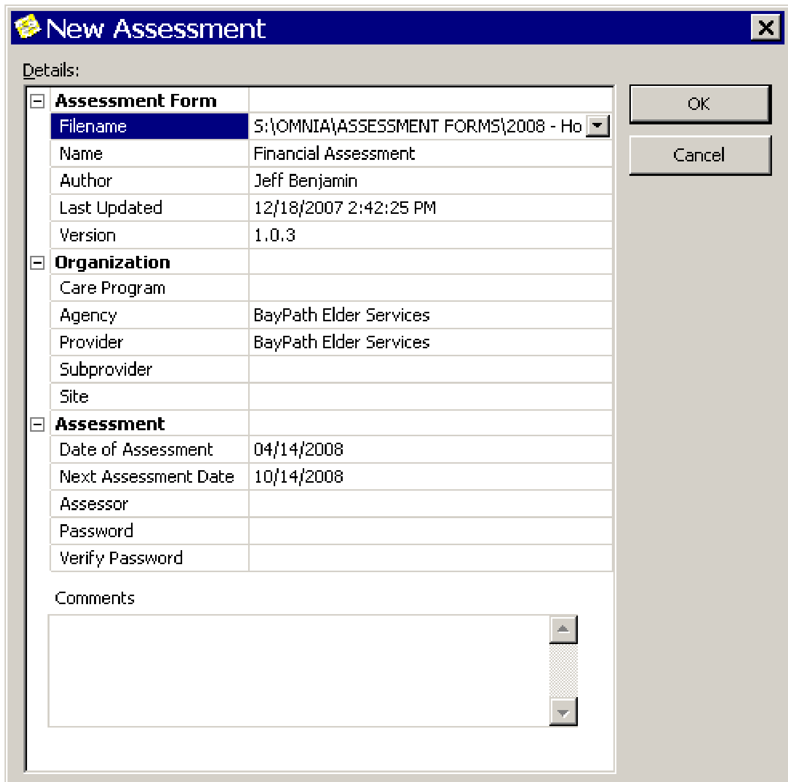
1 Begin a new call.

-OR- Access an existing call. See ***Editing a Call*** (on page 46).

2 Click Consumer Assessments or Caller Assessments in the call navigation pane.

3 Click New Assessment on the toolbar.

-OR- Right-click and select New Assessment. -OR- Select New Assessment from File menu. -OR- CTRL+N.



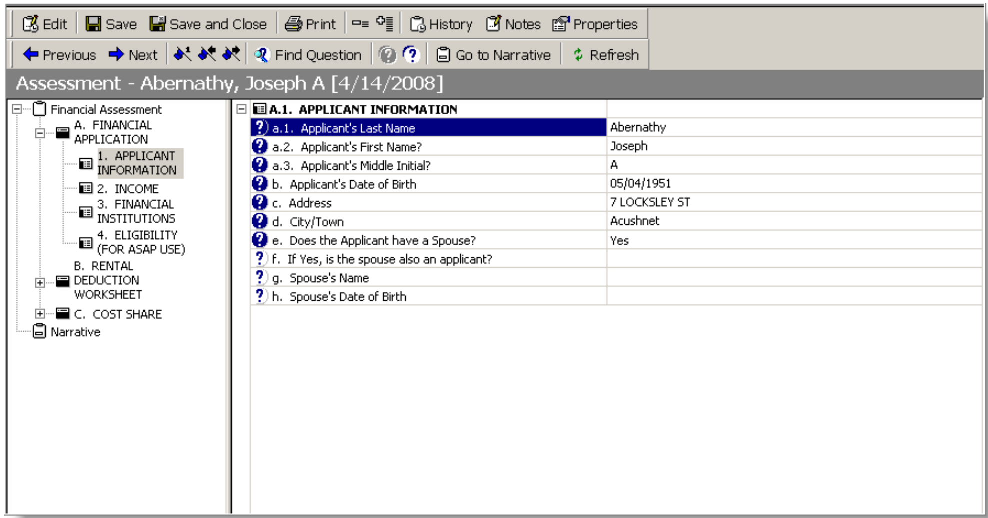
4 Use the *Filename* list to select the appropriate assessment form for this consumer. If there are no forms available, select [Browse..].

5 Enter your name in Assessor. You can choose to password protect this assessment by entering a Password and then entering it again in *Verify Password*. SAMS I&R automatically enters the *Date of Assessment* and *Next Assessment Date* using today's date and the *Reassessment Date* default.

6 Click OK.

7 SAMS may prompt you that your assessment contains indicators that need to be saved. If the prompt appears, click Yes to continue.

8 Enter data into the assessment as outlined in the SAMS User's Guide or Help files. Access the Help files by selecting Search from the Help menu and entering the appropriate terms.



9 When finished, click Save and Close.

➢ *To edit consumer/caller assessments*

1 Access an existing call.

2 Click Consumer Assessments or Caller Assessments in the call navigation pane.

3 Highlight the assessment you want to change and click Edit Assessment on the toolbar

-OR- Right-click and select Edit Assessment. -OR- Select Assessment from the File menu.-OR- CTRL+O.

4 Modify the assessment as needed.

5 When finished, click Save and Close.

➢ *To delete consumer/caller assessments*

1 Access an existing call.

2 Click Consumer Assessments or Caller Assessments in the call navigation pane.

3 Highlight the assessment you want to remove and click Delete Assessment on the toolbar

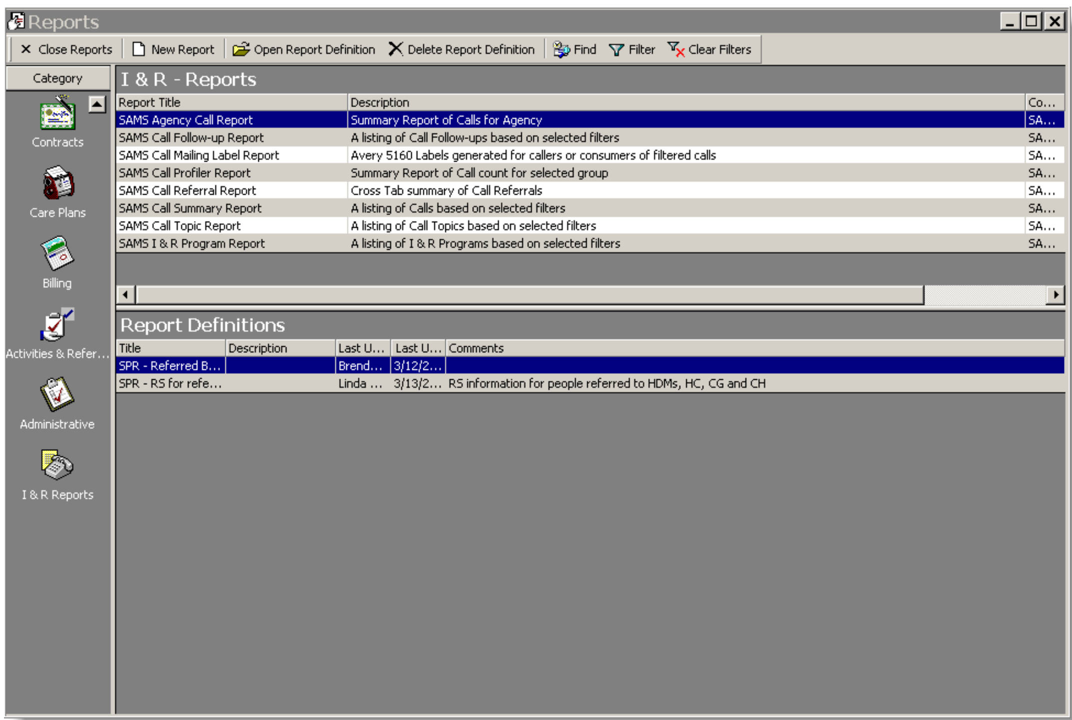
-OR- Right-click and select Delete Assessment. -OR- Select Delete Assessment from the File menu.-OR- CTRL+D.

4 Select Yes at the prompt.

Reports

SAMS offers several highly customizable *I&R Reports* that help you make the most of your organization's call information.

Your user role must have permission to access, create, update, and delete reports.



Report Summaries

- SAMS Agency Call Report - Summary Report of Calls for Agency.
- SAMS Call Follow-up Report - A listing of Call Follow-ups based on selected filters.
- SAMS Call Mailing Label Report - Avery 5160 Labels generated for callers or consumers of filtered calls.
- SAMS Call Profiler Report - Summary report of Call count for selected group.
- SAMS Call Referral Report - Cross Tab summary of Call Referrals.

- SAMS Call Topic Report - A listing of Call Topics based on selected filters.
- SAMS I & R Program Report - A listing of I & R Programs based on selected filters.

For information about using **Reports**, see the SAMS User's Guide or SAMS **Help** files.

I&R Administration

This section of the manual explains what you need to know to set up SAMS Administrator for SAMS I&R.

Since the *SAMS Administrator's Guide* outlines the necessary details and step-by-step procedures needed to configure your database, this guide only provides an overview of the additions to SAMS Administrator that support the I&R integration.

If you find that you want more information about a certain area, or if you want step-by-step procedures, refer to the *Administrator's Guide* or the SAMS Administrator Help files.

Getting Started

First, use the table in the ***Data Administration Overview*** (on page 70) section to familiarize yourself with the new location of BeaconIR's *Data Administration* elements within SAMS Administrator. Then, read through ***Access Role Privileges*** (on page 79), ***Associating Taxonomies*** (on page 75), ***Setting Up Agencies*** (on page 74), ***Setting Up Provider Organizations*** (on page 76), ***I&R Configuration*** (on page 80), and ***I&R Reports*** (on page 78). These are the new areas that you need to be aware of for use with SAMS I&R.

Data Administration Overview

Use the table on the following pages to familiarize yourself with the new location of BeaconIR's *Data Administration* elements within SAMS Administrator.

The first column lists BeaconIR's *Data Administration* setup by area and subarea. For instance, *Keywords* was a subarea of the General area.

The second column lists the new location of the area in SAMS Administrator. You'll see that in many instances the areas and subareas have not changed - you'll still find the *Keywords* subarea under the General area. Shaded areas in the table indicate specific areas/subareas where name or location might be different than what you're used to.

You can add, modify, and delete most fields that appear under subareas. See the SAMS Administrator's Guide or Administrator Help files for related procedures.

It is important to note that if you RENAME any field name descriptions in Keywords, Eligibilities, Accessibilities Types, Disability Types, or any other subarea that appear when searching for ***referrals*** (see "Creating Referrals" on page 30), you MUST rebuild the cache in ***I&R Configuration*** (on page 80). Otherwise, SAMS users cannot use these fields to search for referrals.

SAMS I&R Setup within SAMS Administrator		
BeaconIR *Data Administration* Setup	**Equivalent in SAMS Admin**	**Example of Fields Populated in SAMS I&R**
Area: General Subarea: Eligibilities	Area: General Subarea: Eligibilities	Referrals *Search for Services* screen (if used as a provider eligibility search term)
Area: General Subarea: Fees	Not Currently Implemented	
Area: General Subarea: Follow Up Activities	Area: Program Definition Subarea: Actions	Activities
Area: General Subarea: Keywords	Area: General Subarea: Keywords	Referrals *Search for Services* screen (if used as a search term)
Area: General Subarea: Services	Area: Program Definition Subarea: Services	Service Deliveries, Referrals *Search for Services* screen (if used as a search term)
Area: General Subarea: Titles	Not Implemented	
Area: General Subarea: Referred By	Area: General Subarea: Referred By	Caller Types
Area: General Subarea: Reason Codes	Area: General Subarea: Reason Codes	Activities
Area: General Subarea: Planning	Area: General Subarea: Planning	Topics

SAMS I&R Setup within SAMS Administrator		
BeaconIR *Data Administration* Setup	**Equivalent in SAMS Admin**	**Example of Fields Populated in SAMS I&R**
Area: General Subarea: Priorities	Area: General Subarea: Priorities	Call Priority
Area: General Subarea: ADRC Activities	Area: General Subarea: Call Outcomes	Call Outcomes
Area: General Subarea: Age Groups	Not Currently Implemented	
Area: Types Subarea: Phone Types	Area: Types Subarea: Phone Types	Assessments
Area: Types Subarea: Accessibility Types	Area: Types Subarea: Accessibility Types	Referrals *Search for Services* screen (if used as a provider accessibility search term)
Area: Types Subarea: Resource Types	Not Implemented	
Area: Types Subarea: Call Types	Area: Types Subarea: Call Types	Call Type
Area: Types Subarea: Disability Types	Area: Types Subarea: Disability Types	Referrals *Search for Services* screen (if used as a search term)
Area: Organization Subarea: Resources	Area: Organization Subarea: Providers (Organizations ONLY)	Referrals *Search for Services* screen (if used as a search term), Service Deliveries
Area: Organization Subarea: Programs	Area: Program Definition Subarea: Service Programs	Referrals *Search for Services* screen (if used as a search term), Service Deliveries
Area: Organization Subarea: Sites	Area: Organization Subarea: Sites	Referrals *Search for Services screen* (if used as a search term), Service Deliveries

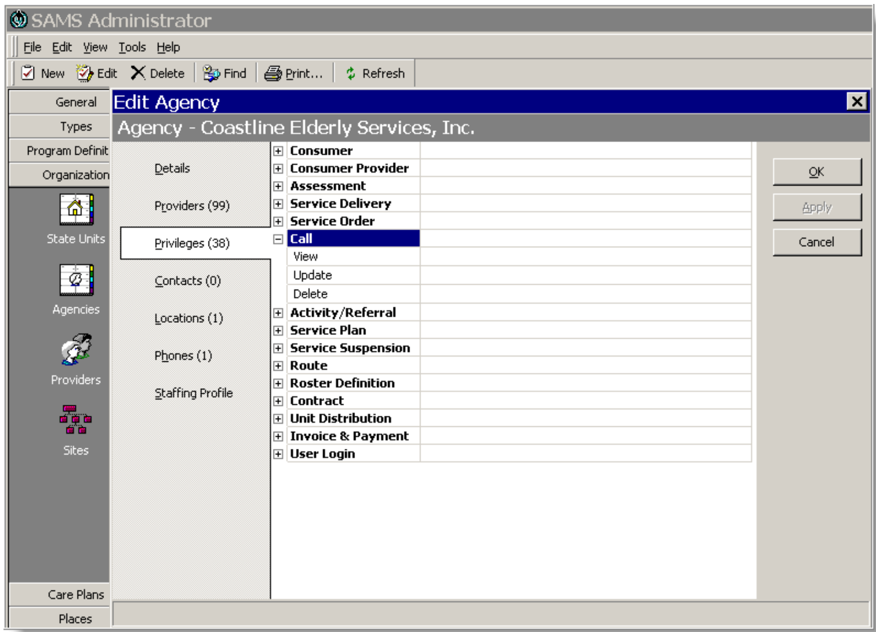
Area: Organization Subarea: Services	Area: Program Definition Subarea: Services	Referrals *Search for Services* screen (if used as a search term), Service Deliveries
Area: Places Subarea: Regions	Area: Places Subarea: Regions	Referrals *Search for Services* screen (if used as a search term)
Area: Program Definition Subarea: Topic Categories	Area: Program Definition Subarea: Topic Categories	Topics
Area: Program Definition Subarea: Topics	Area: Program Definition Subarea: Topics	Topics
Area: Program Definition Subarea: Outcomes	Area: Program Definition Subarea: Topic Outcomes	Topics

With the exception of *Regions*, we have not included any other **Places** subareas because they work the same. You will still need to enter *Zip Codes*, for instance, if you want to include addresses in your database.

Setting Up Agencies

Access **Agencies** under **Organization**.

A **Call** heading has been added to the **Privileges** area of the *Agency* record in SAMS Administrator. Use this to enforce organizational security in the viewing of call records. For example, if you administer the Sunshine Valley Agency's database and you only want that agency's users to able to look at or change Sunshine Valley call records, you can set that up here.



Associating Taxonomies

A taxonomy is a classification of services that is used when searching for referrals.

A new *Taxonomies* area has been added to the *Add/Edit Service* record (under Program Definition). You need to associate services with taxonomies so that when a user enters taxonomy-related search criteria during a referral search, the appropriate services appear. Multiple taxonomies can be associated with a service.

Associating items within Program Definition and Organization provides SAMS I&R users with the detailed information they need to create referrals during a call. For example, ***Provider Organizations*** (see "Setting Up Provider Organizations" on page 76) are associated with *Services*. So by associating an organization with a service, you are linking taxonomies to that organization, as well.

See the SAMS Administrator's Guide or Help files for more details about program associations.

In addition to taxonomies and services, a user can also search on *Eligibilities*, *Keywords*, *Disabilities* and more to generate referrals.

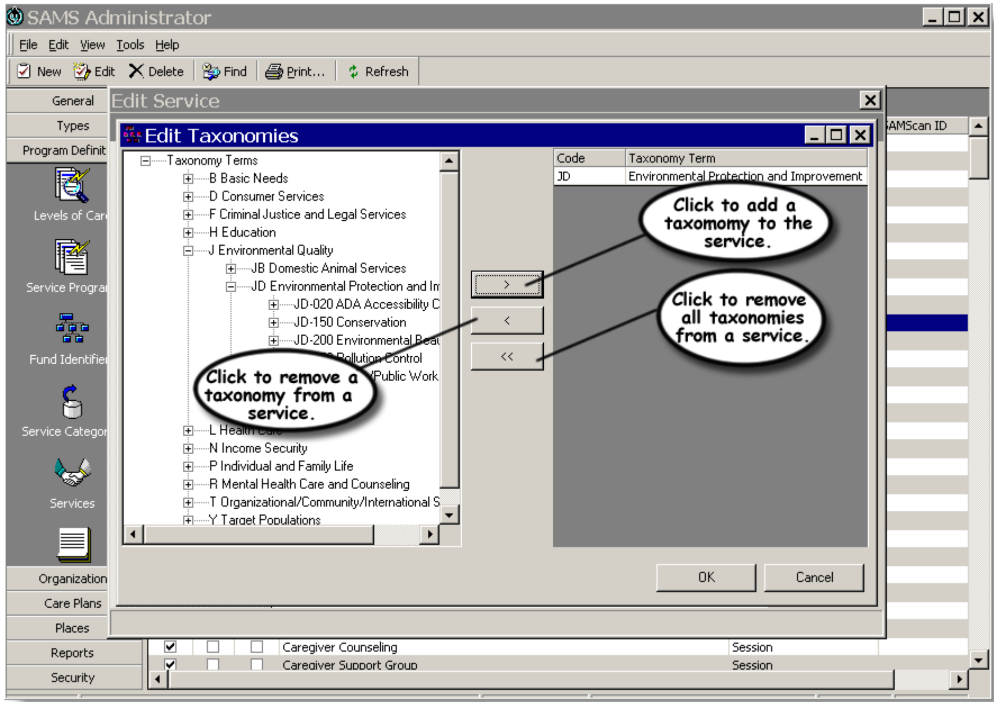
You cannot add, change, or remove the taxonomies available. They are provided by the Alliance of Information & Referral Systems (AIRS), and are built-in to the database.

It is important to note that if you add service taxonomies, you MUST rebuild the cache in ***I&R Configuration*** (on page 80). Otherwise, SAMS users cannot use these terms to search for referrals.

➢ *To add a taxonomy to a service*

1. Click the Program Definition heading in the navigation pane.
2. Click *Services*.
3. Add or edit a service record as outlined in the *Administrator's Guide*.
4. Click Taxonomies.
5. Add or remove taxonomies as needed.

6 Click OK when you are done.



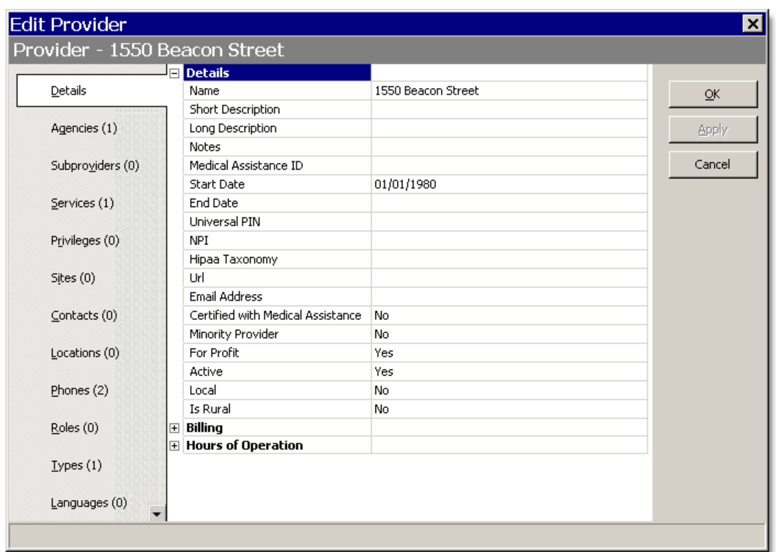
Setting Up Provider Organizations

Access *Provider Organizations* in **Providers** under **Organization**.

Only *Provider Organizations* impact SAMS I&R. New fields and headings have been added to the *Details* area of the *Provider* record. For the most part, these additions are reflected when searching for and creating referrals.

- **Details**: *Short Description*, *Long Description*, and *Url* fields have been added. The *Short Description* field only holds up to 100 characters. *Long Description* is a memo field that can hold much more program detail. Use *Url* to enter a Web site address.
- **Billing** and **Hours of Operation** headings have also been added. Use **Billing** to define an organization's *Is Affordable* status, as well as to specify whether it *Accepts Medicaid*, *Medicare*, and/or *Private Insurance*.

  Use **Hours of Operation** to define an organizations operating hours according to week day.

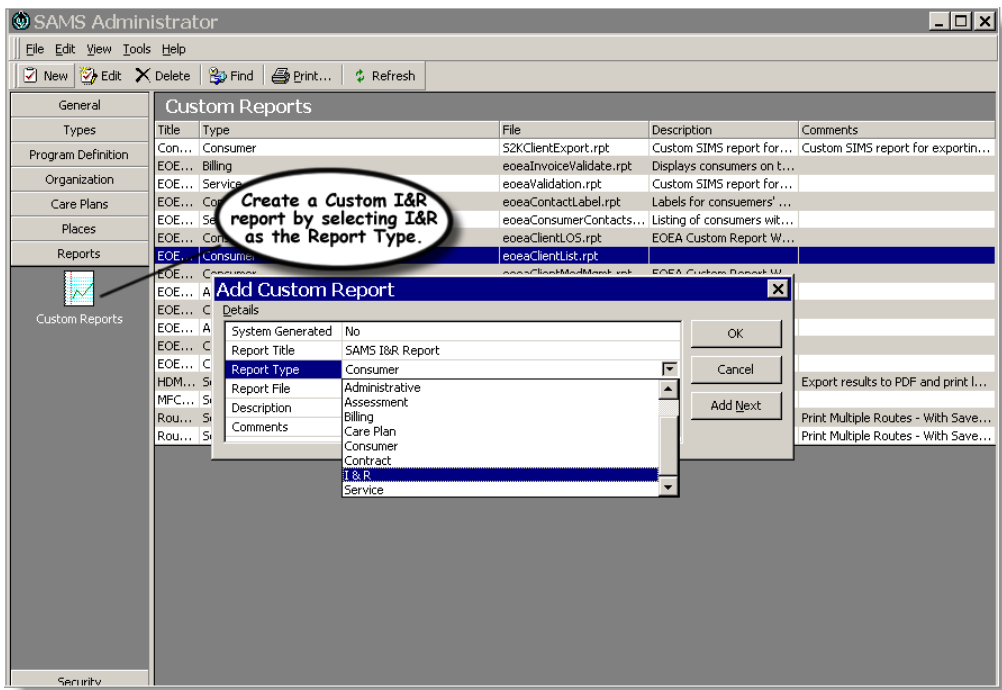


I&R Reports

Access **Custom Reports** under **Reports**.

You can now create custom SAMS I&R Reports in SAMS Administrator. A new *Report Type* of **I&R** has been added to the *Add/Edit Custom Report* list.

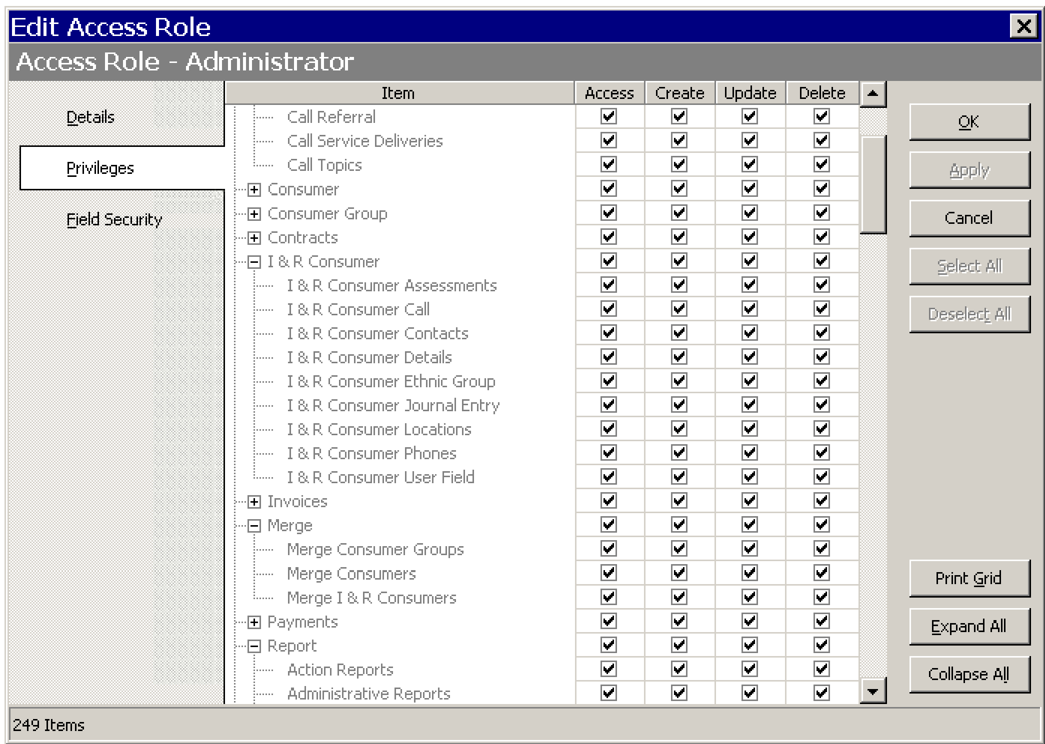
See the *Administrator's Guide* or the SAMS Administrator **Help** files for more information about creating reports.



Access Role Privileges

Access Roles are a subarea of **Security**. Before setting up access role privileges, you must first create *User Logins* and associate them with user *Roles*.

See the Administrator's Guide or **Help** files for more information or step-by-step procedures.



Privileges

Under *Access Roles*, many new *Privileges* have been added - for both SAMS and SAMS Administrator.

For SAMS users, privileges primarily fall into two categories: *Call* and *I&R Consumer*. *Call* privileges are related to the act of actually taking a call and adding topics, referrals, etc., while *I&R Consumer* privileges are related to accessing I&R Consumer information and *Call Log* history.

In SAMS Administrator, you're generally giving administrative-level users permission to access, create, update, and delete the I&R fields and settings that appear in SAMS.

I&R Configuration

An I&R tab has been added to the *SAMS' Global Configuration* dialog (located in the Tools>Configuration menu).

- *Call Service Delivery Option* - decide how you want service deliveries to be recorded when saving a call. Choose to have SAMS automatically record units of service against a consumer (or a consumer group if the caller is anonymous), to prompt users to record units of service when saving a call, to have SAMS automatically record units of service against the call's consumer, or to not record units of service at all upon saving a new call.
- *Allow users to override I&R Configuration* - if you select this option, users can change the I&R settings you have in place.
- *Default Hours of Operation* - you can enter a default *Time Open* and *Time Close*.
- *Disclaimer* - enter disclaimer text that will be included on the page footer of the *Call Summary* Report, the *Call Summary*, and the *SAMS I&R Program* Report.

- *Rebuild Cache* - the I&R cache stores information used during referral searches. SAMS updates the cache automatically ONLY when a provider is modified. There are times when it is necessary for you to update (rebuild) the cache so that users have access to the most up-to-date search information:
    - If you rename keywords, eligibilities, accessibilities, or other SAMS Administrator subareas that are used in referral searches.
    - If you add service taxonomies.
    - If you import provider-related data from IE.